PARTNERS IN **BRAINSTORMS**
AHEAD OF THE TREND ▶ BEHIND THE SUCCESS

State of Arizona

Strategic Contracting Centers

Solicitation No. SCC060001-A1

Statewide Research and Survey Services

Submitted September 30, 2005

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PARTNERS IN **BRAINSTORMS**
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I. INTRODUCTION

Partners In Brainstorms, Inc. (PIB) is pleased to provide this proposal in response to Solicitation #SCC060001-A1 issued by Strategic Contracting Centers. In developing this response, we have maintained our firm's commitment to providing clients the best value in scientifically sound research. It is in this domain that Partners In Brainstorms has excelled since its founding 14 years ago. In every project we undertake, our overriding principle is to design and implement quality research in a client-centered context that identifies and involves key stakeholders, determines shared and entity-specific information needs, and responds to the unique characteristics of the client organization– such as nationwide or statewide offices, oversight boards or commissions, facilities offering different services, heavy reliance on volunteer staffing, and so on.

We are a small female-owned research, communication, and consulting firm located in Phoenix. Our firm has worked with the **U.S. Department of Education**, the **White House**, the **U.S. Postal Service**, **Arizona Game and Fish Department**, **Arizona Department of Health Services' Tobacco Education and Prevention Program**, **Arizona Department of Transportation's Research Center**, **Girl Scouts of the USA**, **Microsoft**, and **America Online (AOL)** to conduct research studies and surveys for such purposes as program evaluation and redesign, needs assessment, market research, and attitude and perception research among customers, potential customers, and employees.

CLIENT-CENTERED APPROACH
Our commitment to uncompromising quality characterizes our ability to meet and exceed client expectations – and much of our work is repeat business from satisfied clients. We work closely with clients to establish realistic research objectives and ensure the collection of meaningful data that achieves those objectives. Most of our research projects include both quantitative and qualitative methodologies, such as questionnaires, online surveys by invitation, on-site and telephone interviews, and focus groups. Unlike many research firms, Partners In Brainstorms does not use off-the-shelf surveys or other research instruments as a means of reducing costs. While we are ever mindful of our clients' budgetary constraints, we prefer to seek out innovative ways to lower costs without sacrificing the benefits of an individualized, client-centered approach to research design.

II. EXPERIENCE / EXPERTISE / RELIABILITY

Requirement 1 – Narrative of Experience Relevant to Proposal

Partners In Brainstorms (PIB) offers a breadth of experience as well as specialized expertise that enables us to provide the variety of research services presented in the Methodology and Approach section of this proposal. PIB staff credentials include decades of experience and demonstrated expertise in market research, communications, and program development in both the nonprofit and profit sectors, as well as specialists in research design, implementation, and analysis.

We create teams on a per-project basis to ensure that they are made up of our best people for the specific area and/or type of research. Maintaining this flexibility also enables us to reduce overhead expense and pass these savings on to our clients in the form of highly competitive rates. The core team for every research project includes one or more of the following individuals, depending on the degree of specialized expertise required: researchers, market research experts, specialists in data collection, survey questionnaire design, focus group usage, and other aspects of methodology, and a writer and graphic designer. Information on team members' experience is addressed in the Personnel Staffing chart later in this section.

Depending on the nature of the research project, additional team members might include focus group moderators, Website and technology specialists, and other professionals with specific subject-matter expertise, such as educators, psychologists, attorneys, health care providers, or specialists in local government (out-of-state, to protect research integrity and confidentiality).

In addition, we have maintained long-standing subcontractor relationships with trusted companies offering high quality and state-of-the-art supplementary research services. For any research projects undertaken through this Solicitation for statewide research and survey services, we expect that PIB's proprietary database of Arizona residents will be used to provide the full complement of participants or supplement a client database as needed. However, when projects call for a broader scope of research participants, we typically work with Survey Sampling International LLC (SSI), the preeminent supplier of population samples to survey research agencies in the USA. SSI's Internet panel of respondents delivers much higher response rates than other suppliers.

Similarly, we rely upon Cooper Research, Inc. for secure Website hosting of online surveys. Cooper's data collection facility is protected from power failure, physical intrusion, and network outages through extensive backup systems, multi-layered security, and network redundancy and diversity.

Finally, PIB research typically incorporates another resource – prequalified, unique-to-PIB panels. At PIB, we believe that involving and engaging key stakeholders is critical to conducting meaningful research for our clients. The nature of the research project helps determine the key stakeholder groups that should comprise or be included on panels for that project. For example, we conducted focus group research for Girl Scouts with mothers of young Hispanic girls, to gain insight into why their daughters didn't participate and why their mothers didn't encourage them to do so. Prior to the focus group, a panel of young Hispanic mothers was assembled to assist in developing discussion questions for the focus group. Subsequently, based on the focus group findings, Girl Scouts decided to develop a direct-mail brochure specifically aimed at young Hispanic mothers, and the same panel was convened to provide initial input and regular feedback throughout the design process.

A research project under the current Solicitation might point to panels of program managers, employees, and/or volunteers; users and potential users of agency-provided services; educators, administrators, and/or school counselors; judges and other justice system representatives such as law enforcement personnel, probation officers, and social workers, and so on. These panels represent a standout difference between PIB and other firms, enabling us to provide the client-centered approach discussed earlier.

PIB has also developed other proprietary research panels and techniques for qualitative research:

- **Ethnicity-, age-, and gender-specific panels** offer insight into a variety of perspectives.

- **On-Site Insight™** provides an unparalleled depth of knowledge obtained through observation of research participants in interactive environments such as home or retail stores.

- **Customer Speak™** is a technique that identifies typical language and images used by contemporary customers in describing concepts, products, and services.

- **Gatekeeper Study™** is a model of interaction and influence between youth and caretakers, and is used to develop marketing and communication solutions to problems that may arise when a product or service must appeal and be acceptable to both parties.

- **Brainstormers Design Team™** works directly with appropriate panels in developing communication and marketing materials that call for a specific perspective.

Requirements 2 through 5 – Business References, Contracts with Partners In Brainstorms, Description of Services, Contact Information

The following pages provide business references for Partners In Brainstorms. Each reference description contains the information specified in Requirements 2 through 5: contact information for the project manager or other individual with whom we worked; information on the nature of the project, including a brief description of the services performed and the associated requirements; specification and dates of previous and current PIB contracts with the client, if applicable; notation of the PIB staff and associates directly involved in performance of the services; and an additional notation citing comparable tasks in this Solicitation that were performed under the contract(s) with that reference.

Girl Scouts of the USA
Girl Scouts–Arizona Cactus-Pine Council / Maricopa County Juvenile Court Center

Ten Emerging Truths / A Girl's World Is Different

Nature of Project: Girl Scouts of the USA (GSUSA) is the world's largest organization committed to serving every girl, everywhere. Of today's 14 million girls ages 11 to 17, 87 percent say there are definite advantages to being part of an all-girl organization, yet only 300,000 – 2 percent – are currently in Girl Scouting. GSUSA's overall goal was to develop and offer a program that girls ages 11 to 17 want to be part of, that is perceived as cool and fun while maintaining the values and program goals that help girls grow healthy and strong.

To achieve this goal, GSUSA engaged Partners In Brainstorms in a multi-year national evaluation initiative called *New Directions for Girls.* Following a systematic and logical course guided throughout by extensive market research, PIB assisted GSUSA in retooling a significant portion of its program, developing associated communication materials, conducting additional research aimed at recruiting young adult volunteers, and soft-launching the program among current members.

As an extension of the national initiative, PIB was engaged by the local Girl Scout council in Phoenix to work on various projects related to the national research findings. One such project, *A Girl's World Is Different*, is included at the end of this case study.

PIB Plan of Action: A three-pronged research approach was developed to involve and gain support from the key stakeholders comprising the nationwide Girl Scouts network and to best utilize data that had recently been gathered by GSUSA as well as conduct original research in areas not yet addressed. These stakeholders included tweens and teens at large, current Girl Scouts, parents, GSUSA management and staff at the national level, including research and program development specialists, and staff and volunteers serving as program providers in over 300 councils in communities across the country. All research was conducted on a nationwide basis. The three areas of focus were:

1. *Current customer perspectives* – Girl Scouts 11–17, adult volunteers (including parents), and council staff members were asked about their "top of the mind" issues, preferences, and ideas related to serving tweens and teens. Methodologies included focus groups, written and online surveys, and telephone interviews.

2. *Producing and delivering the program* – An internal audit of 40 Girl Scout councils around the country explored how councils design, manage, and deliver the Girl Scout program. In-depth interviews were conducted with the executive directors and then with staff teams. The data from the interviews provided insight into staff perceptions of what was working and what wasn't, laying the groundwork for development of a strategic plan to be implemented at the national level that would build on successes and address problematic areas.

3. *Exploring perceptions and reality...and narrowing the gap between* – PIB gathered data from more than 3,000 tweens and teens, of whom approximately 75 percent were non-Girl Scout members and the remaining 25 percent were current Girl Scouts. A combination of qualitative and quantitative research was used.
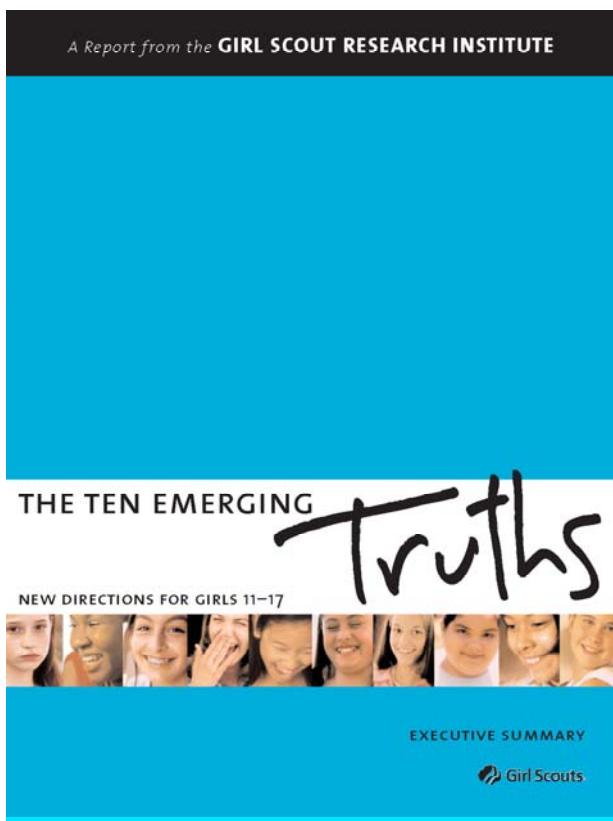
Qualitative research
- Thirty focus group interviews were conducted in seven cities representing the geographical regions of the United States designated by the U.S. Census Bureau.
- A total of 269 girls participated in the groups. Because GSUSA membership is particularly low among Hispanics, four of the groups were structured to consist solely of Hispanic girls.
- Each girl participating in a focus group completed a written survey of open-ended questions exploring her hopes, dreams, challenges, and concerns.
- Parents of the girls participating completed a written survey of open-ended questions that enabled them to share their views of issues facing their daughters and what they would like to see in an organization or group that their daughters might join.

Quantitative research
- Comprehensive 30-question online survey posted for one month on two Websites.
- Of the 1,262 girls who completed the survey, 761 were non-Girl Scouts or former Scouts, and 501 were current Scouts. They represented 47 states, and an extensive screening process ensured that the girls in the sample mirrored the Census Bureau's figures for the youth population in racial and ethnic diversity, type of household, and socioeconomic status.

Outcome: In analyzing the research data, PIB identified 10 key findings – concise and important truths about today's tweens and teens – and their corollary implications for the GSUSA program. PIB prepared an extensive report on the research, including suggestions for new program elements to address each of the key findings and specific actionable recommendations that could be initiated almost immediately. The recommendations emphasized development of a growing customer base to ensure the organization's continued ability to serve tween and teen girls. GSUSA published the PIB report as *Ten Emerging Truths: New Directions for Girls 11–17* and made it available for sale to local Girl Scout affiliates; the report continues to engender sales and has already been reprinted.

Based on the research findings and PIB's recommendations, GSUSA embarked on designing an entirely new program for girls ages 11–17. PIB was again hired, this time to develop the program indicated by the research – the rebranding of a new Girl Scouts component as developed "by girls, for girls" and flexibly structured to reflect the program preferences of contemporary tweens and teens. Throughout the process, PIB tested program elements with panels to ensure that each one spoke to the needs of today's tweens and teens. PIB provided suggestions for program names and logo designs, produced the logo, designed and produced contemporary program materials for girls and adults – including Spanish editions of several publications – and assisted in designing and implementing with the national launch event.
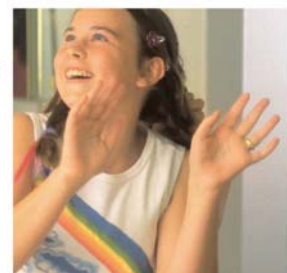
As a side benefit of the extensive national research, GSUSA has been able to use this data to obtain grants to fund expansion of the program. The research report was subsequently made available to the public, and many of the findings have been widely referenced by other nonprofit organizations as well.

On behalf of the Girl Scouts Arizona-Cactus Pine Council and the Maricopa County Juvenile Court Center, Partners In Brainstorms conducted a nationwide review of state juvenile justice programs, including Arizona's, relative to the treatment of girls. This review was a follow-up to the national research study discussed above, focusing on gender-related differences in risk-taking behavior among tweens and teens. The research sought to identify "best practices" in terms of state juvenile justice systems that recognize and respond to these differences with gender-specific programs.

To raise awareness of these differences among organizations and occupations that regularly work with juveniles, the Council and the Juvenile Court co-sponsored a statewide conference examining the future of Arizona's girls ages 8 through 17, "A Girl's World Is Different," and asked PIB to present its findings to the conference participants.
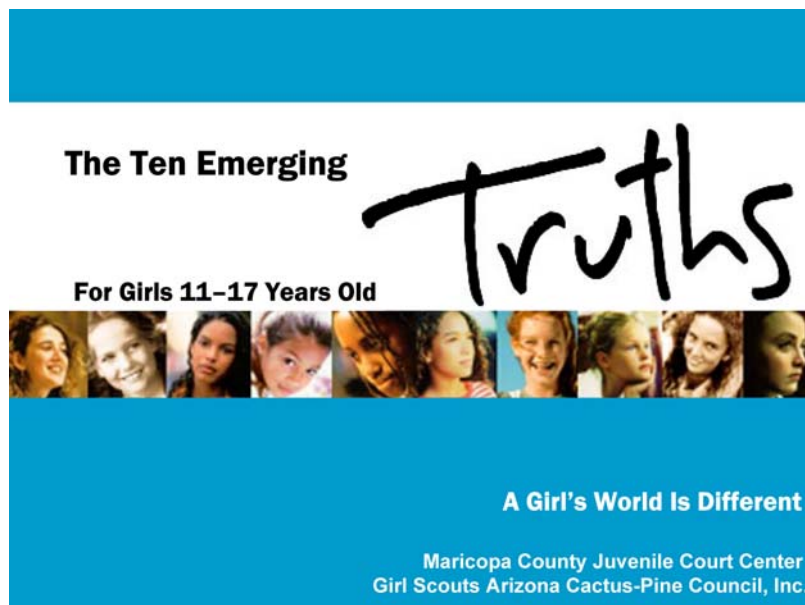
PIB's multimedia program created for the conference presented and compared state and national data, highlighting critical problem areas in Arizona and offering action strategies for conference attendees – representatives of organizations, government entities, and occupations that work with juveniles on a regular basis.

A powerful component of the presentation, as noted by attendees, was the inclusion of girls' "voices" – real statements made by real girls, preserving the vernacular exactly as they had originally been spoken or written – to demonstrate the meaning of otherwise dry statistics and how they applied to real issues in the lives of real individuals.

Key Personnel: D. Pryor, L. Kummer, K. Pryor, D. Meyers, K. McGroarty, E. Castillo, L. O'Keefe, J. Higgins, E. Klimp, T. Miller, E. Gruber, S. Brinegar, G. Rodriquez, A. Deller

Contract Period: 2002-Present

Contracting Entity: Girl Scouts of the USA

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Contracting Entity: Superior Court of Arizona Juvenile Court Center, Maricopa County

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Arizona Game and Fish Department

Perceptions Study

Arizona Game & Fish
MANAGING TODAY FOR WILDLIFE TOMORROW
— azgfd.com —

Nature of Project: The management of hunting and fishing activities in Arizona is only one of many responsibilities that fall under the jurisdiction of Arizona Game and Fish Department (AGFD), but there appears to be limited public awareness of those other responsibilities. AGFD engaged Partners In Brainstorms to assess the public's perceptions of the Department and its public identity, thereby supporting the Department's broader communication goals of increasing public recognition of the Department and its mission, improving public knowledge of the Department's role in the conservation of Arizona's wildlife resources, and improving public knowledge and use of Department services and resources.

PIB Plan of Action: PIB's recommended approach included the following stakeholder groups: key Department managers, employees, customers, and potential customers. With regard to future customers, PIB recognized that the state's shifting demographics related to age and ethnicity have significant implications for the Department. Likewise, AGFD's historical data as well as PIB's experience on other projects indicates gender differences with regard to preferred outdoor activities. Consequently, PIB recommended that the study be designed to permit analysis of data from specific populations within the customer and potential customer groups: youth, females, and individuals of Hispanic ethnicity (especially where Spanish is the primary language spoken at home).

For all stakeholder groups (employees and the public), the following key research objectives were established:

1. Identify various audiences, their specific needs related to the Department, and how those needs might change in the future.

2. Gain insight into perceptions of the Department – attitudes and opinions regarding the Department among various stakeholder groups, both internal and external.

3. Examine the Department's communications with the public – current and "best practices."

4. Identify new and innovative approaches to communicating with diverse constituents.

To meet the research objectives on a cost-effective basis, Partners In Brainstorms recommended the following combination of qualitative and quantitative research:

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Qualitative Research
- One-on-one interviews with key Department managers

- Focus groups with designated employees, conducted in each of the Department's 7 regions

- Focus groups with customers and potential customers, conducted in four major population areas – Phoenix/Mesa, Tucson, Flagstaff, and Yuma – structured as follows: consumptive customers (hunters, anglers, combination hunters/anglers); non-consumptive customers; Hispanic customers (consumptive and non-consumptive); and youth (two age groups, 8–12 and 13–16, each mixing consumptives and non-consumptives)

Quantitative Research
- Two statewide online surveys: one targeted to Department managers and employees, and the other to current and potential customers

Outcome: The Perceptions Study is not yet completed; therefore, for reasons of client confidentiality, PIB cannot disclose preliminary findings in detail. Generally speaking, these preliminary findings indicate that:

- The general public is, for the most part, unaware of the scope of the Department's responsibilities or how they are funded.

- When provided information in these areas, the public responds favorably and expresses its willingness to support increased funding.

- Among the general public, consumptive customers are somewhat more informed than non-consumptive customers, but the difference in awareness is minimal.

- As perceived by the general public, among the Department's strongest assets are its employees, respected for their expertise as well as their dedication.

Key Personnel: D. Pryor, L. Kummer, K. Pryor, D. Meyers, K. McGroarty

Contract Period: May 2004- Present

Contracting Entity: The State of Arizona Game and Fish Department

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America Online
Repositioning AOL@SCHOOL for Success

Nature of Project: America Online, Inc. (AOL) is the world's leading interactive services company, supplying Internet services to more than 20 million members in the United States. In May 2000, AOL launched AOL@SCHOOL as a teaching tool for the classroom, providing educational content geared to specific grade levels as well as communication features and special safety tools. Installation disks were available free of charge to all K–12 schools, enabling the use of AOL@SCHOOL with any existing Internet connection.

In May 2004, recognizing that the education market had changed dramatically in the four years since its launch, AOL@SCHOOL undertook an assessment of its current market position and engaged Partners In Brainstorms to conduct a market research study among teachers of grades K through 12. With the long-term goal of securing broad-based academic support for AOL@SCHOOL as the ultimate provider of online resources and reference tools for teachers, students, and parents, the research was aimed at understanding current and new customer needs, wants, preferences, and likes and dislikes related to the AOL@SCHOOL product and services, as well as its competitors.

PIB Plan of Action: In examining the education market, PIB determined that the educational technology used by schools is frequently evaluated and purchased at the district level by technology administrators. These "technology decision makers" thus became a key stakeholder group. For purposes of the research, the primary stakeholder group of K–12 teachers was subdivided into grade-level ranges that share common concerns and needs related to education technology used in the classroom.

The research objectives were to:
1. Investigate educators' current needs and wants with regard to education resources available online
2. Determine educators' perceptions of the AOL@SCHOOL product and services and its primary competitors.
3. Identify brand drivers – those features that educators value and that differentiate AOL@SCHOOL from its competitors.
4. Provide actionable recommendations to guide in the redesign of AOL@SCHOOL.

PIB conducted a series of focus groups with teachers K–12 in three U.S. markets to determine teacher requirements (current and future), identify highly valued product and program attributes, develop a competitive analysis, and gain a better understanding of the various geographic, demographic, ethnic, and political factors across the country that influence the product and program. Focus group topics included the perception of whether an "ultimate online resource for teachers, students, and parents" currently exists; favorite education resources; preferred features and services; perceptions of the AOL brand; and comparison of AOL@SCHOOL with competitor websites and services.

Additionally, PIB conducted one-to-one interviews with education technology decision makers at the district level. The interviews were aimed at identifying "make or break" criteria in school districts' consideration of whether to implement particular education tools on a districtwide basis.

The findings from the qualitative research were so significant to the future of the AOL@SCHOOL product – impacting its appearance, features, and distribution method – that the intended next step of quantitative research was put on hold while senior management and the product development team considered the issues that had been raised and how best to address them.

Outcome: AOL@SCHOOL is currently being retooled to meet the key needs expressed by educators and technology administrators:

- For AOL@SCHOOL to succeed, it is imperative that it be 100% Web based. This view is shared by teachers and technology decision makers alike. Installed software is steadily losing acceptance among both technology administrators – who cite concerns about capacity, compatibility, and system crashes – and teachers, who want to be able to access the product from home, school, the public library, or anywhere else they want to work on lesson plans.

  As is widely known, AOL had achieved its remarkable success by freely distributing installation discs to the public, and had assumed that the same marketing strategy would be appropriate for AOL@SCHOOL. The transition to a Web-based product represents a major strategic shift for the firm – a shift that can be attributed solely to the findings from stakeholder research.

- Current education philosophy places strong emphasis on three-way involvement among, teacher, student, and parent. Focus group participants noted that the AOL@SCHOOL product lacked a parent component and considered that omission to be a significant flaw.

  As comments to this effect began recurring in one focus group after another, the PIB moderator extended the discussion to elicit suggestions from educators on the most beneficial types of content for parents. AOL@SCHOOL is making use of these suggestions in designing its new parent component.

Arizona Department of Transportation
Arizona Driver License Manual

Nature of Project: Arizona's driver license manual, produced by the Arizona Department of Transportation (ADOT), is the state's main tool for instructing drivers in the rules of the road. As such, it represents both a significant responsibility and opportunity for ADOT to educate the public about safe and sensible motor vehicle operation.

ADOT asked Partners In Brainstorms to conduct research and develop recommendations for maximizing the communication effectiveness of the current Arizona manual prior to its upcoming revision. Specifically, ADOT wished to validate or enhance the manual's subject matter content, presentation of material, methods of distribution, and accessibility to the public.

PIB Plan of Action: To determine the best practices in driver manual publication and dissemination, PIB developed and implemented a research plan that included the following components:

1. Conduct a literature search to find and review driver safety information published by relevant governmental and private agencies and organizations throughout the country.

2. Review driver license manuals and related publications from all U.S. motor vehicle jurisdictions as well as driver safety information identified in literature search. Analyze manuals, publications, and other materials for best practices in content, organization, presentation, distribution methods, availability, special accommodations for particular population segments, etc.

3. Survey all U.S. motor vehicle jurisdictions for information on their experiences, practices, and opinions re improving quality and distribution of manual.

4. Review Arizona manual on the basis of identified best practices to:
   (a) Determine whether all essential elements of rules of the road and safe driving skills are up-to-date and clearly explained.
   (b) Determine whether organization and illustrations are the best possible for thorough comprehension.
   (c) Identify most cost-effective distribution methods and procedures.
   (d) Identify any strategies for improvement.

5. Develop actionable recommendations to implement best practices concerning subject matter content, organization, and accessibility to the public of the Arizona driver license manual.

Based on guidelines developed by the American Association of Motor Vehicle Administrators, PIB identified 212 individual knowledge items representing topics covered in driver license manuals throughout the country. Additional topics were drawn from suggested curricula for driver education programs and traffic safety topics receiving the greatest emphasis in the literature. To identify best practices in subject matter content, each manual was examined to determine which of the 212 knowledge items and additional topics were included. The manuals were also reviewed to determine other best practices related to format, size, use of graphics, etc.

Responses to survey questionnaires completed by motor vehicle jurisdictions throughout the country were compiled and analyzed to determine additional best practices, including publication of specialty manuals, versions in languages other than English, distribution methods, etc.

Outcome: Partners In Brainstorms prepared a final report on the research, including specific recommendations for revision of the Arizona driver license manual. Recommendations addressed subject matter content items to be added, revised for accuracy, or expanded; reorganization of content for improved clarity and ease of use; possible economic savings to be realized by reducing the size; expanding accessibility to the public, and addition of a specialty manual aimed at teenage learners and their parents. The report is scheduled for presentation to the Arizona Department of Transportation next month (May 2005).

Key Personnel: D. Pryor, K. Pryor, D. Meyers, K. McGroarty

Contract Period: 2004 - 2005

Contracting Entity: The State of Arizona Department of Transportation

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Key Personnel: D. Pryor, L. Kummer, K. Pryor, D. Meyers, K. McGroarty

Contract Period: May 2004- Present

Contracting Entity: America Online (AOL)

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U.S. Postal Service / U.S. Department of Education / The White House Celebrate the Century National Millennium Program

Nature of Project: Partners In Brainstorms was hired by the U.S. Postal Service to develop the official millennium education program *Celebrate the Century* to commemorate the people, places, and events of the 20th century. The Postal Service conducted more research for this program than any other marketing program in its history, and PIB had a role in every research study and focus group conducted, every questionnaire created, and every major research report prepared.

PIB also played an integral role in identifying, securing, and working with stakeholders and strategic partners – including the White House, U.S. Department of Education, American Library Association, ten national education associations, and corporate participants like Microsoft and Coca-Cola – to obtain their input during development of the program, extend the program to the Internet, expand the program's reach, and leverage their involvement and program endorsement to teachers and parents.

PIB Plan of Action: The project required an extensive needs assessment involving all stakeholders and strategic partners, to determine their make-or-break criteria – what did they need to have happen, what behavior change did they need to see – to judge their participation successful and beneficial? For example, Microsoft, a primary partner, wanted to create awareness and trial of its new Encarta Online multimedia encyclopedia, which featured new education tools for K–12 teachers. The company also wanted to increase parent, teacher, and student traffic to its MSN site.

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The national education associations needed assurance that lesson plans and education kits would meet the national standards for the subject areas they covered, as well as engender enthusiastic participation by students, teachers, and parents.

Finally, every stakeholder and partner organization needed an overall program participation and distribution strategy that contributed to the creation of a massive database from which specific segments could be extracted for follow-up contacts (e.g., educators, students, participants in specific program components, etc.).

The result was one of the largest cross-curriculum educational programs ever developed. PIB seamlessly integrated history and technology lesson plans, incorporating a technology extension that would direct teachers, students, and parents to go to Encarta Online encyclopedia free of charge and view videos, pictures, and stories of people and events from that decade. In addition to the printed materials, the Celebrate the Century Education Series was exclusively available on Encarta Online. After learning about each decade, students had the chance – for the first time in history – to vote online via MSN or by mail-in ballots.

PIB designed and created many of the program materials for the Celebrate the Century program, including:

- Celebrate the Century brand identity incorporated into all program components and signage

- Over 300,000 Celebrate the Century education kits, each of which was used by an average of 2.5 teachers, thus reaching 18.8 million students nationwide

- Internal communication program reaching 700,000 U.S Postal Service employees

- Promotional signage for 37,000 postal retail outlets and event signage for 30 major press events held nationwide within a 30-day period

Outcome: From the earliest development stages, marketing research conducted by PIB had a significant impact on the success of the Celebrate the Century program:

- A highly positive and enthusiastic response to the program concept among all age groups in all regions helped secure the necessary start-up funding – no small achievement, considering that $60 million was required.

- The program was originally called "March to the Millennium," a name that generated such strongly negative reaction among research groups across the country – from adults as well as youth – that the groups initiated brainstorming efforts to come up with a more pleasing name. And they did so; the program name of "Celebrate the Century" was created by research participants.

- The opportunity to vote for stamp designs was important to all age groups, significantly increasing the likelihood of collecting. This was particularly true of children 8 to 12 years old, who voiced their sentiments about being tired of "phony voting opportunities" where their vote "didn't really count." Since this age group was part of the overall target population – students in grades 3 to 12 – the original plan not to count their votes could have been disastrous. Instead, over 60 percent of the votes cast for each decade came from the target population and the grades receiving the education kits.

The final participation figures for the overall program clearly mark its success:

- Ninety-seven percent of teachers used the materials, reaching 18.75 million students.

- Teachers rated it as one of the best educational kits they had ever received; with 98 percent saying they were "extremely satisfied."

- The program generated in excess of **$100 million in sales** of program-related products such as commemorative stamps, coffee table books, decade-specific merchandise, etc.

Key Personnel: D. Pryor, L. Kummer, K. Pryor, D. Meyers, K. McGroarty, E. Castillo, L. O'Keefe, J. Higgins, E. Klimp, T. Miller, E. Gruber, S. Brinegar, G. Rodriquez

Contract Period: 1994-2000

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Arizona Department of Health Services/ E.B. Lane

Tobacco Education & Prevention Program (TEPP) GearHeadz Project

Nature of Project: Partners In Brainstorms is a lead subcontractor on the TEPP program for children and youth initiatives, and works closely with the Arizona Department of Health Services Tobacco Education & Prevention Program (TEPP), and E.B. Lane's Executive Director of Strategic Planning Peter Juergens.

Currently advising the Arizona Department of Health Services regarding the development of a cartoon series called GearHeadz that targets kids 8 to13 years old and highlights day-to-day situations that tweens can easily identify with, including the pressure to smoke.

PIB Plan of Action: Partners In Brainstorms has conducted two waves of research and is currently preparing for a pre-and-post study to be conducted in June 2004. The research to date has involved evaluating the program, characters, and communication of key messages that promote a healthy, smoke-free lifestyle.

Key Personnel: D. Pryor, L. Kummer, K. Pryor, D. Meyers, K. McGroarty, A. Deller

Contract Period: 2000 – 2005

Contracting Entity: Arizona Department of Health Services/ E.B. Lane

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Girl Scout Research Institute
Voices of Volunteers 18–29

The Girl Scout Research Institute (GSRI) commissioned Partners In Brainstorms to conduct a research study to understand why and how women ages 18–29 volunteer, and how Girl Scouting can use that information to mobilize a new pool of volunteers.

An earlier research study among girls 11 to 17 nationwide had provided a wealth of information about their needs and wants—including their preference for interacting with adults who were closer to them in age. Thirty percent of the 1,500 preteen and teen girls who comprised the sample for the previous study expressed a preference for having college-age females as advisors or group leaders. Their second choice was to work with young female professionals. Girls believed that volunteers who were closer to them in age would provide models for their own development, as well as personal insights about future options and choices.

These and similar findings prompted the Girl Scout Research Institute to embark on another national research initiative—this time, to hear from the young women whom girls wanted to be their advisors.

Research Goals

The Voices of Volunteers 18–29 research was designed to address five key issues:

1. From the perspectives of women ages 18–29 who are currently volunteering, explore the needs and interests that volunteering satisfies and the benefits and challenges associated with volunteering.
2. Identify factors that would maximize recruitment of these young women as volunteers in Girl Scouting.
3. Determine current perceptions of the Girl Scout organization and its adult volunteers.
4. Identify common characteristics (e.g., demographic, psychographics, involvement as youth, prior Girl Scout affiliation) shared by young women who appear interested in volunteering for Girl Scouts.
5. Gain further insight into ways of enhancing the development and delivery system (e.g., training, support from local councils, resources) for Girl Scout volunteers based on the needs and recommendations expressed by the participants.

Methodology

In developing this study, input was obtained from key stakeholders—including local Girl Scout councils and current volunteers—to ensure that their voices and experience were included.

Participants in the study were rigorously screened to assure a mix of ethnic/racial, geographic, and socioeconomic backgrounds roughly mirroring the United States population of 18- to 29-year-olds according to the 2000 U.S. Census data. They were also screened to determine volunteering experiences, educational background, and student and/or employment status (full-time/part-time). These representative proportions were maintained for each research method—qualitative and quantitative. The sample consisted of young women volunteers who had actively volunteered within the six months prior to the interviews and who volunteer more than four hours per month.

Data was obtained through focus groups and an online survey questionnaire, as follows:

Qualitative Research: Focus Groups

Focus groups were conducted in four markets—the New York metro area, Phoenix, St. Louis, and Atlanta. The study included 18 focus groups conducted in two age segments with approximately 200 young women volunteers. Separate groups for volunteers 18–24 and 25–29 were implemented to account for the different stages of life issues and circumstances within the larger age span of 18- to 29-year-old women. Additionally, four of the focus groups were structured to contain only Hispanic volunteers 18–29 (two conducted in the New York area and two in Phoenix).

Quantitative Research – Online Survey

A comprehensive 64-question survey was posted online for two months. A total of 1,002 young women volunteers 18–29 participated in the survey; 452 between the ages of 18 and 24, and 550 between the ages of 25 and 29.

Respondents represented 49 of the 50 states. Their marital status was represented as follows: 49 percent were single, 34 percent married, 12 percent living with a partner, and 5 percent divorced. Their parental status was 41 percent with children, and 59 percent without.

Those who had been Girl Scouts comprised 49 percent of the sample; 51 percent had not been involved in Girl Scouting. On this subject, it is important to note that disclosure of the Girl Scout organization's involvement in the research did not occur until the later stages of discussion and online queries. This was done to insure that perceptions about the organization did not factor into or influence response or participation in the study.

Results

The Voices of Volunteers 18–29 report incorporates key findings or "voices" from both the qualitative and quantitative research. They include a commitment to the ideals of volunteerism, often rooted in childhood experiences and viewed as a family tradition, and the belief that "I can make a difference."

Respondents also identified key factors that contribute to a positive volunteering experience, one that would be likely to attract and sustain their interest and ongoing participation. These factors included the ability of the volunteering experience to meet affective needs, such as feeling valued for their contributions, as well as practical considerations related to time commitments, flexibility, and the supporting infrastructure of the organization.

The study also provided insight into volunteer recruitment strategies, with respondents reporting on how they had learned of their most recent volunteering opportunity and what they felt were the best ways to reach other young women their age.

Most significant is the finding that young women 18 to 29 welcome and embrace the volunteer opportunities inherent in the new Girl Scouting program for girls 11 to 17. They readily relate to its inherent value and benefits for girls today, and express the wish that the same program (STUDO 2B) had been available to them in their youth. They stand ready to answer the call of the many girls and teens nationwide who have expressly asked for their involvement in this program—as advisors, mentors, and responsible friends.

These and the other key findings address the fundamental question of how to reach, engage, and mobilize young women 18 to 29 to look to Girl Scouts as a viable partner in their efforts to volunteer their time and talents to a program that offers them exciting and meaningful ways to make a difference. Girl Scouts of the USA is turning this research into action by developing a volunteer recruiting program targeted to young women 18 to 29 based on the voices expressed in this research study.

Key Personnel: D. Pryor, L. Kummer, K. Pryor, D. Meyers, K. McGroarty, A. Deller

Contract Period: 2003-2004

Contracting Entity: Girl Scouts of the USA

Contact Person: Rachel Steward
Program Director
Girl Scouts Arizona Cactus Pines
119 East Coronado Road
Phoenix, Arizona 85004

Phone Number: 602-253-6359, extension #1209

U.S. Postal Service
National Youth Stamp Collecting Program

Nature of Project: In 1954, 1 out of every 5 children collected stamps. Four decades later, that number had dropped to 1 in 250, a loss of 95 percent market share for a hobby that potentially contributes over $1 billion annually to the U.S. Postal Service's bottom line. Over 80 percent of stamp collectors start the hobby as children. An individual who does not begin collecting stamps as a child is highly unlikely to do so as an adult.

After a national search, the U.S. Postal Service selected Partners In Brainstorms to assist in evaluating their current stamp collecting program for children and youth; determine the needs and wants of the age group 8 to 12 years old; and conduct a series of research studies to help create a new, contemporary program that would motivate today's children and youth to become stamp collectors and to retain their interest in the hobby.

PIB Plan of Action: Partners In Brainstorms conducted a series of program evaluations, qualitative research, and quantitative surveys that contributed to a contemporization of the hobby – "philately" of the 1950s becomes "Stampers" for the new millennium. Over 2 million children became stamp collectors (Stampers) within one year.

Key Personnel: D. Pryor, L. Kummer, K. Pryor, L. McFalls, K. McGroarty

Contract Period: 1994 – 2000

Contracting Entity: U.S. Postal Service (Headquarters)

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Contact Person: Arnetta Cobb-Carter
                        Marketing Director
                        U.S. Postal Service Headquarters
                        1735 Lynn Street
                        Roslyn, Virginia 22209

Phone Number: 703-292-4126

Those staff members highlighted in yellow are key personnel assigned to this project.

STAFF MEMBER	BACKGROUND AND EXPERTISE
1. Debra Pryor **President and CEO**	**20 years of experience in design and analysis of research and marketing programs.** Committed to developing educational programs on a foundation of scientifically sound research, Debra has created effective and award-winning educational programs for such client organizations as the U.S. Department of Education, the White House, Girl Scouts of the USA, the U.S. Postal Service, the Steel Can Recycling Institute, and Arizona's Tobacco Education and Prevention Program. She earned an MBA and a Master's degree in journalism, respectively, from Northwestern University's prestigious Kellogg School of Management and Medill School.
2. Lyn Kummer **Manager, Research Services**	**25 years of experience encompassing all phases of marketing research, from questionnaire design through analysis.** Lyn has designed and/or conducted hundreds of market research projects in such areas as customer satisfaction, corporate image, and new product evaluations. She is experienced in using an array of research techniques including conjoint analysis and market segmentation. Lyn is a member of the Association of Internet Professionals and has taken an active role in improving the quality and efficiency of online data collection. She holds a Bachelor's degree from the University of Cincinnati and has completed postgraduate work there and at Xavier University.
3. Kathleen Pryor **Manager, Client Services Project Director**	**Five years' experience in coordinating and managing youth and education research, strategic planning, and programs.** Kathleen has coordinated nationwide implementation of research studies, including focus groups and online studies. She has overseen the development and distribution of education materials used across the country, served as program liaison to major metropolitan school districts, and worked with numerous education and professional associations to ensure that programs and materials are aligned to national and state standards. Kathleen holds a Bachelor's degree from Florida State University.
4. Deborah Meyers **Manager, Creative Services**	**Thirty years' experience in organization communications in the nonprofit sector.** Deborah has written and/or produced hundreds of in-house and external communications materials for various purposes and audiences—from employee manuals to public information programs. She has developed programming and informational materials for numerous seminars and national conferences. Deborah holds a Bachelor's degree in psychology and is pursuing a Master's degree in English education.
5. Andrew Deller **Web Survey Developer**	**Over seven years' experience in the computer information systems field.** Andy assists in the designing and programming web surveys requiring levels of customization creating customer interfaces for real-time project management using MS Visual InterDev, VBScript, JavaScript, MySQL, MS Word, MS Excel, SPSS, Wincross. Andy has experience analyzing, designing, programming in many languages and development environments using Ci3 2.5, WinCATI, SPSS 10.0, MS Access/Excel/Word/Visio 2000, MS Visual Basic 6.0, MS SQLL Server 7.0, VBA, VBScript, Crystal Reports, ADO 2.6.

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STAFF MEMBER	BACKGROUND AND EXPERTISE
6. Kellie McGroarty Manager, Finance and Operations	**Over thirty years' experience in the accounting field.** Kellie assists in the management and supervision of the finance area. She provides overall coordination and maintenance of the Advantage accounting program. Kellie prepares detailed reports of operations and transaction activities, and reviews and analyzes the effectiveness of operating procedures, recommending changes and improvements as appropriate. Kellie is well informed on new developments and ideas that would affect financial operations.
7. Guillermo Rodriguez Graphic Designer	**Over thirty years' experience in graphic design.** Guillermo has conceptualized, designed, and produced promotional materials, logos, publications, and curriculum materials for many projects with the Girl Scouts of the USA, Bonne Bell, Universal Studios, and the United States Postal Service. He also produces technical illustrations for a variety of materials and is skilled in numerous design-related software programs.
8. Linda O'Keeffe Project Specialist	Linda has worked in new product development, marketing, and marketing research, and has a strong background in qualitative research. She is skilled in all phases of marketing research from questionnaire design through analysis. Linda earned a Bachelor's degree in marketing from Miami University.
9. Jane Higgins Field Specialist	Jane has more than 19 years of data collection and field management experience. She is responsible for field operations and quality assurance. Jane holds a Bachelor's degree from Denison University.
10. Eric Klimp Data Processing Specialist	Eric manages the data processing and IT functions. He is familiar with the latest tabulation software, including Survent (survey) and Mentor (data table) packages. Eric holds a Bachelor's degree from Indiana University and has attended numerous technical symposiums on data processing/software design.
11. Teresa Miller Senior Data Processing Specialist	Teresa has over 20 years' experience in the industry. She is a senior level programmer in both CfMC Survent and Mentor, and has worked on numerous research projects. Teresa is a graduate of the Northeast Metro Technical Institute located in Minnesota.
12. Ellen Gruber Coding Specialist	Ellen oversees the coding process. She has over 15 years of market research experience and has developed a disciplined and highly regarded coding operation. Ellen holds a Bachelor's degree in sociology from the University of Cincinnati.

13. Sandy Brinegar Project Assistant	Sandy has had extensive training in coding and data processing, with most of her experience having been gained in the field as an interviewer, senior interviewer, and field supervisor. In her current position, Sandy assists in coordinating both qualitative and quantitative projects.

Partners In Brainstorms

Debra Pryor
President and CEO

| **Deborah Meyers** **Manager, Creative Services** | **Kathleen Pryor** **Manager, Client Services** **Project Director** | **Lyn Kummer** **Manager, Research Services** | **Kellie McGroarty** **Manager, Finance and Operations** |

Guillermo Rodriguez
Graphic Designer

Linda O'Keeffe
Project Specialist

Sandy Brinegar
Project Assistant

Jane Higgins
Field Specialist

Eric Klimp
Data Processing Specialist

Teresa Miller
Senior Data Processing Specialist

Ellen Gruber
Coding Specialist

Resumes of Key Personnel

DEBRA C. PRYOR

PROFESSIONAL EXPERIENCE

1991-Present   **President and CEO**
                          Partners In Brainstorms, Inc.
                          Phoenix, Arizona

Since founding Partners In Brainstorms in 1991, Debra Pryor has guided the firm in an unwavering pursuit of excellence in research. PIB is the only firm in the Southwest – and one of the few nationwide – that specializes in developing and implementing scientifically sound research as the basis for innovative youth and parent directed programs.

Throughout her 20 years of experience in the research and K-12 education arenas, Debra has played an integral role in finding out what engages kids?...keeps their attention?.... and applying this knowledge in developing hands-on, minds-on programs and activities that encourage active learning.

She is the author of *Marketing to Schools; On-site Insight: Technology in the Classroom; Ahead of the Trend Study: Youth and Education; The Ten Emerging Truths: New Directions for Girls 11-17; Empowering the Next Generation Learner;* and *Brand Education and the New Purchasing Dynamics,* and has been quoted on educational and youth-marketing issues in *USA Today*, *New York Times*, *Los Angeles Times*, and *Marketing to Kids Report.* Ms Pryor has spoken at a variety of education-related conferences and special events presented by such organizations as Microsoft, Northwestern University's Kellogg School of Management, the Department of Education, Thunderbird's International School of Management, the American Marketing Association, Kid Power, and Girl Scouts of the USA.

A strong advocate for ethical advertising and marketing to children, she served in an advisory role to the Federal Trade Commission on such children's issues as Internet safety and protecting children's privacy, and has addressed numerous business groups on compliance with federal legislation in this area.

1983-1991   **Vice President, Management Supervisor**
                           W.B. Doner & Company Advertising
                           Southfield, Michigan

W.B. Doner & Company is the world's largest independent marketing and advertising agency. Debra rose rapidly through the ranks to become the youngest vice president in the company's 50-year history. While at Doner she supervised and managed over $100 million in international marketing and advertising for such noted retailers as:

- May Department Stores (Lord and Taylor, Filene's)
- Federated Department Stores (Bloomingdale's, Burdines, Macy's)
- Mattel, Fisher-Price, PLAYSKOOL, Little Tikes, Kenner Retail Vendor Programs
- Paramount Theme Parks (Carowinds, Canada's Wonderland, Kings Dominion, Kings Island, Great America)
- ShopKo Stores
- SUPERVALU (Cub Foods, Save-A-Lot)
- Zellers (Canada's largest retailer)

1982-1983   **Account Director**
                           Leo Burnett Advertising
                           Chicago, Illinois

Debra managed the national and international marketing efforts for new program initiatives for both McDonald's and United Airlines. As an Account Director, Ms. Pryor supervised related marketing research, brand identity development, advertising and promotion for these two international corporations.

EDUCATION

2004-2004   **Executive Global Leadership Program**
                           Thunderbird, The Gavin School of International Management
                           Glendale, Arizona

Thunderbird has been ranked #1 in international business education by *U.S. News & World Report* for eight consecutive years and also earned the same #1 ranking in *The Wall Street Journal's* inaugural business school ranking last year. The Executive Program provides participants with a more sophisticated perspective on the fundamental factors driving today's global business economy as they acquire useful decision-making tools for increased job performance. Participants gain a greater understanding of other cultures, regions, and markets, including the impact of the Hispanic market in the United States.

1982-1983   **Master of Integrated Marketing Communications/MBA**
                            Northwestern University
                            Evanston, Illinois

Through a unique program at Northwestern University, earned an MBA from the Kellogg School of Management and a Master's degree in integrated marketing communications (IMC) from the Medill School of Journalism. IMC is being implemented at top corporations and agencies across the country and around the world. These organizations need forward-thinking professionals who understand the changing marketplace and can implement the customer-focused approach that is critical to their future success.

1978-1982   **Bachelor of Science, Business Administration**
                            Valparaiso University
                            Valparaiso, Indiana

Valparaiso University is a nationally ranked liberal arts college which specializes in international programs in marketing and business. Awarded a marketing internship with Gruën Toy Company, involving the development of marketing and advertising strategies for both Central and South American markets.

LYN M. KUMMER

PROFESSIONAL EXPERIENCE

2001–Present   **Manager, Research Services**
Partners In Brainstorms, Inc.
Phoenix, Arizona

Lyn Kummer began working with Partners In Brainstorms in 2001 and has over 20 years of industry experience encompassing all phases of marketing research from questionnaire design through analysis. She has designed, managed, and/or otherwise participated in over 1,000 market research projects of various types, including customer satisfaction, awareness and image, new product evaluations, feasibility studies, and pricing. She is heavily involved in PIB online research initiatives developed to improve the efficiency and quality of online data collection activities. Currently Ms. Kummer is a member of the Association of Internet Professionals and the American Marketing Association.

1994–2001   **Strategic Accounts Manager**
Cooper/ IntelliStar
Cincinnati, Ohio

Designed and conducted over 100 studies estimating market size/potential and analyzing business-to-business buying cycles and influences. Experienced in an array of research techniques and methods including conjoint analysis, market segmentation, and TURF analysis.

1991–1993   **Research Consultant**
Independent Contractor
Cincinnati, Ohio

Facilitated hundreds of in-depth discussions with business executives, health care professionals, and consumers. Collaborated with researchers in medicine, orthopedics, geriatrics, and epidemiology in designing and conducting clinical trials.

1976–1990   **Marketing Research Manager**
Indumar, Inc.
Cincinnati, Ohio

Clients included major nonprofit organizations such as the American Red Cross as well as Fortune 500 companies such as GlaxoSmithKline. Provided strategic direction and hands-on management of research programs.

EDUCATION

2005   **Post-Graduate Courses**
                University of Cincinnati and Xavier University
                Cincinnati, Ohio

1975   **Bachelor of Science**
                University of Cincinnati
                Cincinnati, Ohio

KATHLEEN PRYOR

PROFESSIONAL EXPERIENCE

1998–Current **Manager, Client Services**
Partners In Brainstorms, Inc.
Phoenix, Arizona

For America Online – AOL@School, coordinated discussion groups throughout the country among educators of grades K–12 to examine technology trends in the classroom and teacher awareness and usage of education web portals. Worked closely with AOL@SCHOOL curriculum development and website design teams to apply findings regarding needs and wants of teachers, students, and parents to the redesign of this education portal and its related services, including searchable lesson plans, class projects, content identified by age and grade level, online references, and homework help. For the past two years, AOL@SCHOOL has been selected for inclusion on "Curriculum Hot Spots on the Web," the list of best education and curriculum websites published annually by *District Administration,* a magazine for district-level decision makers in K-12 education.

Coordinated implementation of qualitative component of nationwide research study for Girl Scouts of the USA (GSUSA), involving 30 focus group interviews conducted within four months in seven cities representing major U.S. geographical regions. Assisted in developing new program for tween and teen girls, "STUDIO 2B," corollary materials for girls and adult advisors, and interactive website. In June 2005, the Studio 2B website earned a Distinguished Achievement Award from the Association of Educational Publishers.

As project manager on Jurassic Park Institute, the interactive educational website on dinosaurs created for NBC Universal Studios and Steven Spielberg's Amblin Entertainment*,* worked closely with paleontologists and curriculum development team in creating content for students in grades 3–5. Coordinated efforts with the National Science Teachers Association to build awareness and promote usage of the website among members, incorporate its use into existing and approved NSTA educational efforts, and obtain educator verification that content met or exceeded national curriculum guidelines and standards for science.

For U.S. Postal Service, assisted in developing eye-catching, kid-friendly materials and implementing youth events around the country to educate children about stamps and stamp collecting. In its first year, the "Stampers" program garnered over 2 million youth members. Subsequently worked on "Celebrate the Century" program for U.S. Postal Service and strategic partners, including the U.S. Department of Education, the White House, and Microsoft Corporation.

1996–1998   **Executive Sales Manager, Juniors Department**
Burdines
Ft. Lauderdale, Florida

Managed 20 employees, 3,000 square feet of selling floor, and annual sales of $3.1 million. Increased sales by 50 percent in less than two years through merchandise planning, staff training, improved customer service, and initiation of employee incentive programs.

EDUCATION

1996   **Bachelor of Arts**
Florida State University
Tallahassee, Florida

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DEBORAH MEYERS

PROFESSIONAL EXPERIENCE

2002–Present   **Manager, Creative Services**
Partners In Brainstorms, Inc.
Phoenix, Arizona

Oversees development and production of all research and program materials. Assists in conducting qualitative research and preparing research reports. Co-authored style guide for Girl Scouts of the USA website authors and contributors.

2000–2002   **Editor/ Lead Editor**
Evans Newton, Inc.
Scottsdale, Arizona

Edited customized curriculum and assessment materials in language arts, mathematics social studies, and science for school districts nationwide. Developed style sheets to maintain consistency of format and appropriateness of content according to client preferences. Promoted to lead editor after one year, with responsibility for maintaining deadlines and coordinating editors' workflow, including assigning work to freelance editors as necessary; working with other individuals and departments to address editorial as well as human resources issues; providing input for performance reviews; and interviewing applicants, making hiring recommendations, and managing training of new staff.

1992–1999   **Communications/Public Relations Freelancer**
Phoenix, Arizona

In-house and off-site assignments in organization communications, public relations, project coordination, writing, and copyediting. Major clients/employers included:
Mastering Computers, Scottsdale, AZ – software-training provider
Gorsuch Scarisbrick, Scottsdale, AZ – publisher of college-level textbooks
PHX Downtown, Phoenix, AZ – monthly newspaper
SHR Perceptual Management, Scottsdale, AZ – corporate/brand positioning agency (additional coordinator, GMC account team)
Maricopa County Bar Association, Phoenix, AZ – attorney association (coordinated annual 10K race fundraiser and served as interim public relations director after leaving full-time employment to enter graduate school).

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1987–1992   **Communications/Public Relations Director**
Maricopa County Bar Association
Phoenix, Arizona

Coordinated ongoing programs and special events to help public understand and utilize legal system. Worked with volunteers—officers, committees, and members—to develop and promote new programs. Prepared and issued news releases, public service announcements, and media kits on association activities. Handled media calls for information, interviews, etc. Developed and produced brochures, booklets, flyers, and other promotional material distributed to members and public. Wrote articles for monthly newspaper.

1981–1986   **Account Executive, Membership Development**
American Medical Association
Chicago, Illinois

Managed 12- to 23-state territory with responsibility for increasing AMA membership among local and national affiliates while assisting them in membership development. Increased AMA membership 21% in territory and 30% in each of 4 target states. Prepared annual territory plan, identifying target states and segments. Planned, implemented, and developed collateral materials for cooperative campaigns using direct mail, personal contact, and phonathons. Assisted in program planning for national and regional seminars. Served as faculty, on-site coordinator, etc., as needed.

EDUCATION

Ongoing   **Graduate work toward Master of Science, Rhetoric and Composition**
Arizona State University
Phoenix, Arizona

1973   **Bachelor of Science, Psychology**
Minor in Organization Development
Illinois Institute of Technology
Chicago, Illinois

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ANDREW DELLER

PROFESSIONAL EXPERIENCE

2004–Current   **Web Survey Developer**
                      Partners In Brainstorms, Inc.
                      Phoenix, Arizona

Arizona Game and Fish Department generated reports combing disparate data sets from internal and external surveys. Generated cross tabs, inserted data and results into report templates coordinated data submission and formatted with multiple users. Manage and hosted server for OpinionResearchOnline.com. Provide final data analysis using industry stand tools using MS Visual InterDev, VBScript, JavaScript, MySQL, MS Word, MS Excel, SPSS, and WinCross.

Girl Scouts of the USA designed and programmed web surveys requiring levels of customization not attainable through turn-key solutions. Created customer interfaces for real-time project management, planned and developed databases for data collection and study administration, built a set of tools and templates to streamline production.

2003–2004   **CATI Survey Programmer**
                     Pioneer Research, Inc
                     Chamblee, Georgia

Programmed CATI surveys implementing more rigorous documentation and pres-testing. Contribute to logical survey design aiding CATI set up, and extraction/analysis of data files. Used Ci3 2.6, WinCATI 4.2, Sensus 4.2, SPSS 11.0, MS Excel/Word 2000.

2000-2002   **Systems Programmer**
                     The Myers Group
                     Snellville, Georgia

Learned and followed strict NCAQ HEDIS and CDC BRFSS protocols during programming, programmed CATI surveys to include initial data processing, formatting, and storage. Programmed Teleform scripts for survey scanning to include data verification, processing and storage. Created processing programs to combine and format data from multiple methodologies and sources. Extracted and prepared data for analysis. Created automated interim report solutions in Excel and improved overall data processing time 30-fold and first-time report accuracy by roughly 80% through applications created in my first six months. Used Ci3 2.5, WinCATI, SPSS 10.0, MS

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Access/Excel/Word/Visio 2000, MS Visual Basic 6.0, MS SQLL Server 7.0, VBA, VBScript, Crystal Reports, ADO 2.6.

EDUCATION

2002 **Bachelor of Science in Computer Information Services**
    DeVry University
    Decatur, Georgia

HONORS AND AWARDS

- Dean's list every term 1998-2002.
- Secretary/Treasurer of DeVry Chess Club for two terms.

OTHER PERTINENT INFORMATION

- Analyzing, designing, programming in many languages and development environments including:
  - Sawtooth Software
  - SPSS Syntax and SAX Basic
  - Visual Basic/VBA
  - SQL
  - HTML/DHTML/XML
  - JavaScript/JSP
  - VBScript/ASP
  - C/C++/MFC
  - MS Visual Studio
  - MS Visio
  - PERL/CGI
- Installing and configuring PC components, troubleshooting PC problems
- Working in Novell, NT (Win2K), and UNIX LAN environments.

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III. METHODOLOGY AND APPROACH

Every research project is different – the product of a unique combination of area of focus, broad purpose as well as specific objectives, methodology, stakeholder issues and interests, client needs — and the true unknown variable, the research participants. At Partners In Brainstorms, we welcome and enjoy the challenge associated with these differences and unknowns; we understand that they represent the epitome of true research, a search for new information – or more often than not, simply a new perspective – that gives us insight into a better way. Whether that refers to a better product, a better service, or a better way to deliver either to someone who needs it, each is a worthy goal for an organization – and, therefore, a research focus that deserves to be treated with respect by any research firm engaged by that organization. That's why you'll never see Partners In Brainstorms use a cookie-cutter approach – or a cookie-cutter research instrument – in designing and implementing research studies for clients.

Conversely, no such flexibility exists in our firm's adherence to principles of ethical and scientifically sound research – in that regard, Partners In Brainstorms is unyielding.

The remainder of this section presents Partners In Brainstorms' methodology and approach for the types of research we propose to perform under this Solicitation, as outlined in the Scope of Work. Each component discussed in this narrative references PIB case studies – projects that demonstrate similar kinds of research and services performed. These case studies follow the narrative, completing this section on Methodology and Approach.

- 3.1.   General Research – all components, 3.1.1. through 3.1.8
- 3.2.   Strategic Business Planning and Policy Development – component 3.2.1 Strategic planning
- 3.3.   Research Types – all components, 3.4.1. through 3.4.4.
- 3.4.5.   Survey Types – all components, 3.4.5.1. through 3.4.5.3.
- 3.4.6.   Survey Purposes – all components, 3.4.6.1. through 3.4.6.7.

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3.1. General Research

As noted earlier, every research project is unique. requiring a design and methodology that mesh smoothly to meet the client's needs as well as address other relevant factors associated with participants. To clearly identify the client's needs, determine the overall research design, and help the client accomplish the ultimate goal of turning research into action, Partners In Brainstorms implements a process that contains four key milestones:

Define research objectives and specify needs → Develop research methodology → Collect, process, and analyze data → Present results and actionable recommendations
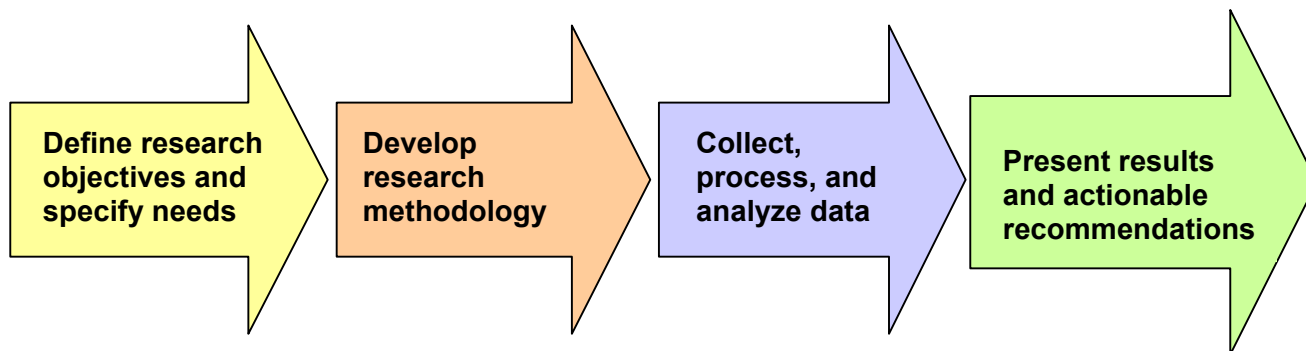
3.1.1 Economic/Fiscal Impact Research

Partners In Brainstorms implemented economic impact survey traces spending through an economy and measures the cumulative effects of that spending. The impact region is determined by the nature of the proposal and can be the entire country, state, an individual municipality or a combination of municipalities. Partners In Brainstorms believes that defining the area of influence is an important first step in the survey process.

In addition to surveying the economic consequences of a particular project on the local economy, Partners In Brainstorms would also suggest a broader evaluation survey or decision-making process. For example, there may be social benefits and ecological consequences that need to be taken into account, which would require a different methodology than a general impact survey. Partners In Brainstorms has found that in some cases a more general cost benefit analysis will attempt to place a monetary value on environmental and social impacts.

Partners In Brainstorms feels it is necessary to survey and estimate the proportion of employment and spending that will occur in the municipality in order to accurately represent what the impact will be. Partners In Brainstorms would propose when measuring economic impacts and various studies or approaches we may propose that the survey addresses one or more of the following measures:

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1. Employment levels (jobs)
2. Value added (or gross regional product)
3. Aggregate wages and salaries
4. Wealth (including property values)
5. Business output (sales volume or spending).

Each of these measures reflects a particular dimension of improvement in the economic well-being of area residents, which is usually the major goal of economic development efforts. Partners In Brainstorms has found that the majority of economic/fiscal impact surveys focus on the changes in employment levels and spending as the most easily determined and understood measures of economic impact. However, economic impacts can also be measured by the rise in personal income and property values

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Total Employment Levels reflect the number of additional jobs created by economic growth. This is the most popular measure of economic impact because it is easy to comprehend. However, job counts don't necessarily reflect the quality of employment opportunities, nor do they reflect salary levels.

Value Added (which is normally equivalent to Gross Domestic Product or Gross Regional Product) is a broader measure of the full income effect. This measure essentially reflects the sum of wage income and corporate profit generated in the study area. However, Partners In Brainstorms has found that in today's increasingly global economy, value added can be an over-estimate of the true income impact on a local area insofar as it includes all business generated there. It may include, for example, dividends to owners of the business who do not reside in the study area, and that which is reinvested in corporate facilities outside of the study area. Thus, while value added is the most appropriate measure of impact on overall economic activity in a geographic area, so are the wages and salaries.

Aggregate Wages and Salaries in an area rise as pay levels rise and/or additional employees are hired. Either or both of these conditions can occur as a result of growth in business revenues. As long as nearly all of those affected employees live in the study area, this is a reasonable measure of the personal income benefit of a project or program. However, it is still an under-estimate of the true income impact, insofar as there is also some net business income (profit) generated that may be paid out. For example, business income may be paid as dividends to local residents or reinvested locally in buildings, equipment or labor training, thereby further improving the economic base of the area.

Wealth is also a reflection of generated income. In economic terms, it is the present value of a discounted stream of future income. A good measure or barometer of wealth in a community is property value. However, it would be double counting to add property value changes to income or value added changes when calculating economic impact. This is because when property values rise in a community as a result of increased economic activity, the rise may be a direct consequence of increased aggregate personal income or investment of business profits, which is a current phenomenon in the state of Arizona and key municipalities.

Business Output (also referred to as revenue or sales volume) is the broadest measure of economic activity. It, in turn, includes the full (gross) level of business revenues, which pays for costs of materials and costs of labor, as well as generating net business income (profits). This can be a misleading measure of economic development benefit, since it does not distinguish between a high value added activity (generating substantial local profit and income) and a low value added activity (generating relatively little local profit or income from the same level of sales). Business output is a problematic measure of economic development because it is difficult to avoid double and triple counting.

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Partners In Brainstorms would also look at economic impacts that lead to financial impacts, which are changes in government revenues and expenditures. Economic impacts on total business sales, wealth or personal income can affect municipal revenues by expanding or contracting the tax base. Impacts on employment and associated population levels can affect municipal expenditures by changing demand for public services. Yet while they are related, financial impacts are not the same as the broader economic impacts on a community.

Partners In Brainstorms seven steps below describe in general terms the inputs, analysis and products of an economic impact analysis.

Step 1: Define the scope of the study and alternatives to be considered in the analysis.

Step 2: Define exactly what decisions need to be made, what information is being requested, and what questions the study should answer.

Step 3: Determine how detailed the assessment should be.

Step 4: List in the study all fundamental assumptions and limitations.

Step 5: List all economic impacts that are considered.

Step 6: Determine what data are needed, what are available, and how they will shape the study.

Step 7: Analyze the effect of each alternative on the individual economic areas being considered and analyze indirect effects (or cross-impacts) among economic areas.
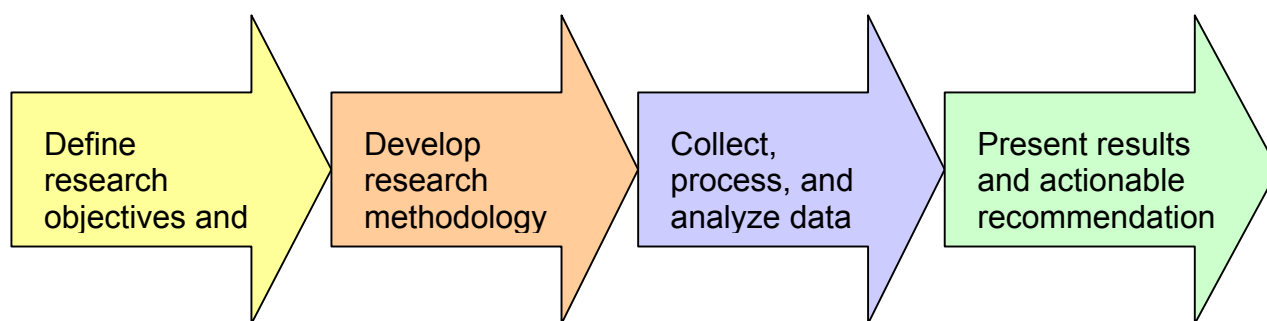
Applicable Case Studies

1. U.S. Postal Service/U.S. Department of Education/The White House
   Celebrate the Century National Millennium Program
2. Girl Scouts of the USA *Ten Emerging Truths for Girls 11-17*
3. Arizona Game and Fish Department

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3.1.2. Market Research

Partners In Brainstorms, Inc. believes that market research is the function which links the consumer, customer, and public to a company, organization, municipality or local government through information—information used to identify and define market opportunities and problems; generate, reline, and evaluate market actions; and monitor market performance.

Market research implemented by Partners In Brainstorms specifies the information required to address these issues; designs the method of collecting information; manages and implements the data collection process; analyzes the results; and communicates the findings and their implications.

The process Partners In Brainstorms uses for market research:

| Define research objectives and | Develop research methodology | Collect, process, and analyze data | Present results and actionable recommendation |

Define Research Objectives and Specify Needs. The first step Partners In Brainstorms takes with their clients is to define the problem or need specifically and agree on the research objectives. Management must steer between defining the problem too broadly or to narrowly. Objectives must be obtainable and address specific needs.

Develop Research Methodology. The second step in Partners In Brainstorms market research process is to develop the most efficient plan for gathering the needed information either through secondary sources or primary data. Primary data can be collected in four ways: 1) observation, 2) focus groups (qualitative), 3) surveys (quantitative), and 4) experiments. The determination of the methodology to be selected is largely dependent on the research objectives, needs and budget parameters. During this phase, Partners In Brainstorms also designs a sampling plan that addresses: Who is to be surveyed? How many? and How should the respondents be chosen?

Collect, Process, and Analyze Data. Partners In Brainstorms believes in utilizing ever-changing technology to aid in the collection, processing and analyzing of the data. Partners In Brainstorms is experienced in all forms of collecting data (focus groups, one-on-one interviews telephone interviews, mail surveys, online surveys). Over the last three years, we have seen a tremendous acceptance and public preference for online surveys.

Validity of Web-Based Surveys
According to a major study conducted by Krosnick and Chang (2001), Web survey participants' responses "contained fewer random and systematic errors than their telephone counterparts." The study offered three explanations for these differences:

1) One is the recency effect, which can occur when questions are presented aurally and respondents, lacking sufficient time to process all the responses, select the last response offered.
2) Web surveys are comprehended and controlled by respondents at their own pace versus that of the interviewer.
3) Telephone interviews showed a high degree of compliance, indicating that respondents may tend to agree with what they perceive is the interviewer's opinion rather than voice their own beliefs and attitudes.

Large Proportion of Hispanic Internet Users in Arizona
Also, Internet usage is increasing in Arizona. According to Northern Arizona University, which conducted a study for the Grand Canyon State Poll in 2001, 68 percent of all Arizonans were using the Internet on a daily basis, a 10% increase over usage in 2000. In addition, according to the Pew Internet & American Life study, the three-state region referred to as the Border States (Arizona, New Mexico, and Texas) are tied with California for the largest proportion of Hispanic Internet users in the country (21 percent of all Internet users). As previously noted, according to the 2000 Census, the Hispanic population of Arizona represents 25.3 percent of the entire state population.

Present Results and Actionable Recommendations. Partners In Brainstorms develops research reports that are engaging, enlightening, and actionable. Many of the research reports created for Girl Scouts of the USA are in fact being sold at a profit to the public and contained in the Library of Congress (see Ten Emerging Truths for Girls 11-17 and Voices of Volunteers). The reports incorporate images, graphs and actionable recommendations that can be implemented in the real world.

Applicable Case Studies

1. Arizona Department of Game and Fish *Statewide Perceptions Study*
2. Arizona Department of Health Services Tobacco Education & Prevention Program (TEPP) – *Youth Outreach Campaign GearHeadz Study*
3. Girl Scouts of the *USA New Directions for Girls 11-17 Study*

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3.1.3. Operations Research

Operations Research or what Partners In Brainstorms and corporate America is now calling **Management Science**, we believe is an approach to management that maintains that productivity can be improved and organization effectiveness increase by means of the scientific method and the use of mathematical models.

Partners In Brainstorms stresses a system approach that views the total operating system and analysis a problem within the system, whether it be within a corporate environment, organization, municipality or local government. Partners In Brainstorms is also unique in this area; whereas, many research and consulting firms concentrate on the production or service side of the operation, **Partners In Brainstorms focus more on the worker and the human dimensions of the management function**.

Based on Partners In Brainstorms' corporate experience, we are finding that the leading companies, such as Time Warner and AOL (America Online) in today's ever-changing environment are continuing to see growing limitations of implementing Operations Research, which often fails to account for unanticipated opportunity or threats.

Today, the preferred method is the **Contingency Approach**. The Contingency Approach asserts that there is no universally applicable approach to a management problem but that the correct solution will depend on the unique needs of the situation. The approach is eclectic and makes use of management techniques from many other approaches, including Operations Research. It is distinguished by a problem-solving methodology that begins with a situation analysis and ends with the generation, evaluation and recommendation of a potential solution to solve the managerial problem.

Partners In Brainstorms believes that in today's world, the Contingency Approach is the preferred methodology for determining the best possible solution to any organizational problem. The Partners In Brainstorms' methodology for this approach consists of the following step-by-step program for an organization, municipality or local government to determine the best solution:

1. Perform a situational analysis, consisting of:

    a. Analysis of the current internal condition of the organization

        i. Internal organizational strengths

        ii. Internal organizational weaknesses

    b. Projection of the future external condition of the organization.

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       i. External opportunities for the organization

       ii. External threats to the organization

2. Based on the situational analysis, formulate a statement of the problem.

3. State the performance standards that meet the following requirements and the completion of which indicates that the problem has been solved. Performance standards are stated in the form of behavior that is:

    a.   Observable

    b.   Measurable

    c.   Relevant to the goal.

4. Generate alternative solutions to the problem.

5. Evaluate the possible solutions in terms of the consequences to those involved in and with the organization, specifically the stakeholders.

6. Select the best alternative solution that solves the problem and causes the least number of detrimental side effects in the organization.

7. Implement a pilot or beta test of the proposed solution and revise as indicated form practical experience.

8. Implement the solution.

9. Evaluate the solution.

10. Revise the process as necessary.

Applicable Case Studies

1. Arizona Department of Game and Fish *Statewide Perceptions Study (Employees and Management)*
2. Girl Scouts of the USA *New Directions for Girls 11-17 Study* (Creation of New Program)
3. Girls Scouts of the USA *Voices of the Volunteer Study* (Operations Research – Attracting and Retaining Volunteers Key to Organization Success)

3.1.4 Program Evaluation

Defining Objectives

Applying our research-into-action process described above, PIB's first step in conducting process evaluation research is to define its objectives. We do this by meeting with the client and asking several key questions about the program, the answers to which are essential to planning the research. This discussion helps clarify the purpose of the research for the client as well as PIB, and clients sometimes decide to modify or expand the original focus of the evaluation as a result of their broadened perspective on the program. These key questions include:

▸ In what stage of development is the program – i.e., single-service, multi-service, coordinated-service, or collaborative program? This information helps determine the scope and focus of the research. For example, a relatively new program is not ready to assess results/outcome but could benefit from such information as user demographics, satisfaction levels among users, or public awareness of its services. On the other hand, a long-term collaborative program might wish to assess its effects on the community or the success of interagency coordination and cooperation.

▸ What is the program trying to do? A logic model may be used here to articulate the program mission, clarify the program design, explain the service delivery method, and specify intended results and how they can be measured.

▸ What information does the funding agency expect? Are there additional reporting requirements to be met?

▸ Who is the program's target population? What methods are used to reach that population? Are participants actively recruited? Is participant recruitment a program goal?

▸ What does the program already know? Have evaluations been previously conducted? Is there data available on community needs related to this program? If the program uses a computer system, is a management information system (MIS) in place?

▸ What does the program want to know? Possible areas include responsiveness to participant needs, community perception of program and services, primary users of services, most frequently used services, effectiveness in attaining goals, cost effectiveness, expected demands for additional services, resources needed to provide those services (e.g., staffing, training), etc.

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Because it is essential that this conversation be as candid as possible, PIB typically suggests that the researcher meet with the various key stakeholders individually, asking the same questions of each. This method encourages candor on the part of the stakeholders and has the added benefit of identifying areas in which stakeholders express similar or dissimilar views.

Developing Research Methodology
Based on the information obtained during the planning phase, followed by a thorough literature review of similar evaluation research, an evaluation approach and methodology are developed, keeping first and foremost in mind the specific needs of the client. The nature and scope of the evaluation further helps determine such factors in the research plan as the use of qualitative, quantitative, or a mix of both research methods; use of participant sampling; and relevant variables to be measured, such as gender, ethnicity, rural or urban location, number or type of services used, frequency of participation, etc., as well as data collection methods.

As previously discussed, stakeholders are the populations most directly affected by evaluation findings and recommendations, and involving them early on – before data collection even begins – contributes significantly to meaningful evaluation research. For example, informing program staff of the nature and purpose of a program evaluation helps stem rumors among staff and improves overall cooperation.

Using Specialized Resources
As noted previously, PIB creates teams on a per-project basis to ensure that they are made up of the best people for the specific area and/or type of research. When necessitated by the nature of the project, PIB has available the services of several researchers with expertise in specific subject areas. For example, when we conducted qualitative research nationwide for "A Girl's World Is Different" – a review of juvenile justice programs around the country regarding their services aimed at girls – we included on the team a licensed clinical/research psychologist highly skilled at conversing with a wide range of individuals and widely respected for her sensitivity when dealing with children and teenagers.

Collecting, Processing, and Analyzing Data
Again, the nature and scope of the evaluation, including the methodology factors discussed above, helps us determine the most appropriate data collection methods. For the most part, we use a combination of methods that include reviewing program records, reports, proposals, previous evaluations, and similar documents; interviews and/or focus groups of stakeholders; on-site observation of participants; and surveys of service providers (including volunteers, if applicable), service users, and if feasible, individuals who are eligible to obtain program services but remain non-users.

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As research participants, stakeholders are typically the richest source of information about a program. Providers as well as users know what's working and what isn't – and if their views on the subject differ significantly, that information itself might prove to be among the most valuable obtained. Therefore, depending on the size of the stakeholder population, PIB typically conducts one-on-one interviews with a few designated key stakeholders as well as one or more focus groups of stakeholders. Depending on the scope of the evaluation, qualitative data obtained from stakeholders can be used to identify areas for further quantitative research.

When the overall research plan – objectives, approach, and methodology – is completed, we prepare two additional documents: a budget that specifies the client costs and the services to be provided to the client under the proposed plan. If the plan calls for subcontracted services, those costs are incorporated into the budget presented to the client; we are big fans of the "no surprises" principle. A corollary timeline is also prepared that includes each task and deliverable (such as interim reports prepared by PIB), specifies its completion date, and notes whether it is the responsibility of the client or of PIB. This graphical presentation of the entire evaluation process, step by step, is helpful as a checklist and progress monitoring tool, as a reference when scheduling other time commitments, and as a confirmation of task responsibility and due date. We take our deadline commitments very seriously, and in the rare event that we anticipate a delay on our part, we notify the client immediately and look for ways to get back on schedule.

Presenting Results and Actionable Recommendations
The final milestone in the research-into-action process is PIB's preparation of a final report and actionable recommendations based on the research findings. Depending on the evaluation project, PIB's recommendations may address an indicated need for staff training, clarification of protocols and procedures, coordination of service delivery among providers, etc. Whatever the subject of the evaluation, PIB presents clearly stated recommendations for specific action. The recommendations may range from suggested action that can and/or should be taken as quickly as possible to long-term strategic planning, but they will always be specific and geared to the designated audience. Several of PIB's final reports on extensive research projects have been published by the client for sale to the public and continue to be sold as reference tools and guidelines for action.

Applicable Case Studies

1. Arizona Department of Game and Fish *Statewide Perceptions Study*
2. Girl Scouts of the USA *New Directions for Girls 11-17 Study* (Creation of New Program)
3. Girls Scouts of the USA *Voices of the Volunteer Study* (Operations Research – Attracting and Retaining Volunteers Key to Organization Success)

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3.1.5. Policy Development Research

The notion of "policy" encompasses a broad range of organization types and the corresponding constituencies impacted by the policy. Governmental entities establish public policy – often in the form of legislation – that governs all citizens under their jurisdiction. Business organizations establish internal policies concerning employee behavior, including treatment of employees by other, higher-level employees. And professional membership organizations often establish both internal and external policies, with internal policies aimed at administrative issues and external policies reflecting a public stance being taken because of the organization's natural involvement in the issue – the National Education Association issuing a policy statement about overcrowded schools and the appropriate teacher-student ratio, for example.

For any organization, consideration of a policy change often arises as a perceived solution to a problem – frequently, a distantly related problem – and that might well be the case for a state agency undertaking policy development research under this Solicitation. Statewide budgetary cutbacks, for example, can lead to policy changes that curtail the delivery of services – not because the services are problematic, but paying for them is.

For reasons like this, P—I—B-- approaches policy development research as a heavily front-loaded process. That is, our typical first step of identifying needs and defining research objectives must expand considerably – and frequently that expansion occurs prior to needs identification by means of preliminary qualitative research conducted "under the radar" to get an early sense of constituent reaction. The nature of the organization or entity, the specific policy area under consideration, the breadth of the affected constituency – each of these factors can independently impact the nature and duration of this preliminary phase.

In the case of particularly sensitive policy issues, we often take on the role of facilitator first and researcher second, to help clarify the issues behind the policy change.

Applicable Case Studies

1. Arizona Department of Game and Fish *Statewide Perceptions Study (Employees and Management)*
2. Girl Scouts of the USA *New Directions for Girls 11-17 Study* (Creation of New Program)
3. Girls Scouts of the USA *Voices of the Volunteer Study* (Operations Research – Attracting and Retaining Volunteers Key to Organization Success)

3.1.6. Customer and/or Employee Satisfaction Research

As discussed earlier, Partners In Brainstorms (PIB) emphasizes the client-centered approach in every project we undertake, from program evaluation to policy development. When research turns into action, and PIB is involved in making that happen, we follow the same philosophy by assembling a panel representing our client's customers. And we continue to work with that panel throughout the design process, obtaining feedback and relaying it on to our client.

We approach the design of customer and/or employee satisfaction research the same way – we look at everything in our client's organization through the eyes of its customers and/or employees. What do we see? What don't we see? What do we want to know more about? And we ask our client to do the same thing . . . ask the same questions, which frequently leads to entirely new questions and areas to investigate.

All this sounds very easy, and in terms of implementing research, it probably is. However, our experience over the years has shown us that meaningful customer or employee research must come from the top down; if senior management isn't actively supporting the study, there's probably not much point in raising anyone's hopes for no reason.

We are currently wrapping up a percepton and attitude study for Arizona Game and Fish Department, where senior management has been highly supportive. The study began with the collection of qualitative data through personal individual interviews with most of the management team. At that step and every other, we have been working closely with our client to identify key questions.

Applicable Case Studies
1. Girl Scouts of the USA New Directions for Girls 11–17 Study (Nationwide Research Among Girls to Identify Their Preferences for Program)
2. Arizona Department of Game and Fish *Statewide Perceptions Study (*General Public's Attitudes/Opinions Regarding Services)
3. AOL@SCHOOL

3.1.7. Needs Assessment

At Partners In Brainstorms, we feel strongly about the purpose and value of needs assessment and analysis projects – that they should be undertaken to ensure that modifications under consideration for a program or service be grounded in the needs and priorities of the anticipated end users or "customers," and that a real commitment exist to address those expressed needs to the extent realistically possible,

Defining Objectives
Applying our research-into-action process described earlier, PIB's first step in conducting a needs assessment is to define its objectives. While needs assessment research can be succinctly defined as a systematic examination of *what is* in comparison with *what should be*, its scope can be as broad as the health care needs of the state's incarcerated population or as narrow as training needs on technical procedures among the staff and volunteers of a grant-receiving organization. Additionally, needs assessments can be undertaken for different purposes. A service provider might use the comparison between *what is* and *what should be* to identify and resolve shortcomings in existing delivery systems. A Division manager might undertake needs assessment research as part of the strategic planning process, to identify developing trends and the corollary services that are likely to be required from the Division in the short term and long term. And in a social marketing context, needs assessment goes beyond the identification of problems to include an examination of values, beliefs, and concerns of consumer populations – the *why's* behind their behavior. Knowledge of these factors provides valuable insight into the information channels and types of messages that will be most effective in reaching these populations – with the ultimate goal of effecting positive change in consumer behavior (e.g., to stop smoking, obtain prenatal care, etc.).

Members of the research team meet with the client to determine the specific purpose and scope of the needs assessment. Areas to be explored include:

- Problems or deficits – Indications from existing data, program or service usage and non-usage, comparisons with other communities, consumer complaints, staff comments or turnover, difficulties with procedures, forms, documentation, reporting mechanisms, etc.

- Impending change – Anticipated problems due to new procedures, technology, staffing, etc.

- Opportunities – Proactive approach to developing trends, taking advantage of new technologies

- Strengths – Individual staff and/or volunteers, organization climate of department or division, facility and physical resources, staff development program, documentation of procedures, etc.

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- Target populations – Consumers, staff, or both; ethnicity, age, or gender related; community or statewide, etc.

Developing Methodology

Based on the information obtained during the definition of objectives, and following a thorough review of the literature, a research plan for the needs assessment, including research methodology to be utilized, is developed. Depending on the scope and purpose of the specific needs assessment project, the PIB research team considers various qualitative and quantitative methodologies and presents its recommendations to the client. Qualitative methodologies include:

In-depth interviews with key stakeholders – Depending on the scope and nature of the needs assessment, these interviews may be conducted locally or in various locations throughout the state, and the individuals interviewed may be managers, other staff, volunteers, regular program/service users, community leaders, educators, families, etc.

Focus groups – Depending on the scope and nature of the needs assessment, these focus groups may be conducted locally or in various locations throughout the state, and groups may be structured to represent specific population segments.
Quantitative research requires data collection from a large enough proportion of the target population to permit extension of the findings to the overall target population. This is sometimes difficult to achieve if the focus of the needs assessment is narrow and the target population is small. When quantitative research is appropriate for the project, PIB recommends the use of online surveys over telephone banks for the following reasons:

According to a major study conducted by Krosnick and Chang (2001), Web survey participants' responses "contained fewer random and systematic errors than their telephone counterparts." The study offered three explanations for these differences:

- One is the recency effect, which can occur when questions are presented aurally and respondents, lacking sufficient time to process all the responses, select the last response offered.
- Web surveys are comprehended and controlled by respondents at their own pace versus that of the interviewer.
- Telephone interviews showed a high degree of compliance, indicating that respondents may tend to agree with what they perceive is the interviewer's opinion rather than voice their own beliefs and attitudes.

Also, Internet usage is increasing in Arizona. According to Northern Arizona University, which conducted a study for the Grand Canyon State Poll in 2001, 68 percent of all Arizonans were using the Internet on a daily basis, a 10 percent increase over usage in 2000. In addition, according to the Pew Internet & American Life study, the three-state region referred to as the Border States (Arizona, New Mexico, and Texas) is tied with

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California for having the largest proportion of Hispanic Internet users in the country (21 percent of all Internet users). This figure takes on even greater significance when combined with one from the 2000 U.S. Census – the Hispanic population of Arizona represents 25.3 percent of the state population.

Collecting, Processing, and Analyzing Data

The research plan developed for the specific needs assessment helps determine the data collection methods to be used. Generally, needs assessments begin with a collection of qualitative data from key stakeholders. This information then helps us construct a framework for the subsequent quantitative research, including the primary issue of whether the needs assessment warrants sampling and whether the target population is large enough to permit it – e.g., a needs assessment for employees of a specific Division of state government versus a needs assessment for a segment of the statewide population.

When the overall research plan – objectives, approach, and methodology – is completed, we prepare two additional documents: a budget that specifies the client costs and the services to be provided to the client under the proposed plan. If the plan calls for subcontracted services, those costs are incorporated into the budget presented to the client; we are big fans of the "no surprises" principle. A corollary timeline is also prepared that includes each task and deliverable (such as interim reports prepared by PIB), specifies its completion date, and notes whether it is the responsibility of the client or of PIB. This graphical presentation of the entire evaluation process, step by step, is helpful as a checklist and progress monitoring tool, as a reference when scheduling other time commitments, and as a confirmation of task responsibility and due date. We take our deadline commitments very seriously, and in the rare event that we anticipate a delay on our part, we notify the client immediately and look for ways to get back on schedule.

Presenting Results and Actionable Recommendations

The final milestone in the research-into-action process is PIB's preparation of a final report and actionable recommendations based on the research findings. Depending on the focus of the needs assessment, PIB's recommendations might include suggested strategies for resolving a problem, preparing employees and customers for impending change, involving employees in identifying trends and developing proactive strategies, expanding upon strengths, etc. PIB recommendations are always specific, actionable, and responsive to financial or other constraints experienced by the client.

Applicable Case Studies

1. Girl Scouts of the USA New Directions for Girls 11–17 Study (Nationwide Research Among Girls to Identify Their Preferences for Program)
4. Arizona Department of Game and Fish *Statewide Perceptions Study (*General Public's Attitudes/Opinions Regarding Services)
5. AOL@SCHOOL

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3.1.8   Focus Groups

The focus group is one of the most frequently used techniques in marketing research. A focus group can be defined as a loosely structured interactive discussion conducted by a trained moderator among a small group of respondents simultaneously. Partners In Brainstorms, Inc. believes that focus groups can be used for a number of different purposes:

- To generate hypotheses that can be further tested quantitatively
- To generate information helpful in structuring consumer questionnaires
- To provide overall background information
- To get impressions on new-product concepts for which there is little information available
- To simulate new ideas about older products
- To generate ideas for new creative concepts
- To interpret previously obtained quantitative results
- To understand emotional reactions to brands

Establish objectives. The first step Partners In Brainstorms takes with their clients is to define what the management wants to achieve from the focus groups. Identify clear marketing research objectives from the management team and what they want to benefit at the end of the focus groups.

Determine the research design. The second step in Partners In Brainstorms market research process is to recognize the target market segments and areas that need exploring. Once that is determine, then the size of the focus groups and number of focus groups is important, also the location is determine to reach a diverse population.

Develop a screening profile for the focus group participants. Partners In Brainstorms strongly believes a screener is essential to having a successful research study. When selecting the participants a screener is used to identify the best person qualified for the focus groups based on a series of questions designed for that particular study. Partners in Brainstorms looks at demographic characters, product or service experience, and commitment from participate before confirming focus group participation.

Establish a budget. Partners In Brainstorms has conducted multiple focus groups over the years within their estimated budget. In selecting the focus group facility Partners In Brainstorms references Impulse Survey Book, the Green Book, and the Blue Book for focus groups recommendations. Next, Partners in Brainstorms request three competitive bids from one market to determine the best value before reserving a research facility. In addition to the facility cost, Partners In Brainstorms fairly budgets travel expenses, moderator costs, equipment rentals, and incidentals.

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Develop a Discussion Guide. After identifying the research objectives Partners In Brainstorms develops the discussion guide, a detailed action plan to generate creative opinions from focus group participants. The discussion guide is used as an agenda to help achieve the goals of the research study.

Applicable Case Studies

4. Arizona Department of Game and Fish *Statewide Perceptions Study*
5. America Online *AOL@SCHOOL*
6. Girl Scouts of the *USA New Directions for Girls 11-17 Study*

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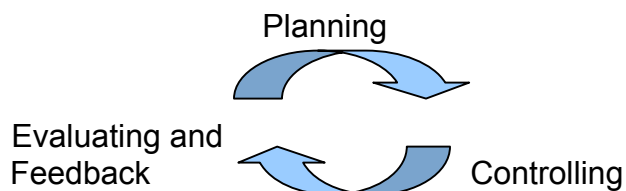*AHEAD OF THE TREND* ▶ *BEHIND THE SUCCESS*

3.2 STRATEGIC BUSINESS PLANNING AND POLICY DEVELOPMENT

Within this task general category of Strategic Business Planning and Policy Development, Partners In Brainstorms would like to respond to 3.2.1 Strategic Planning.

3.2.1 Strategic Planning

At Partners In Brainstorms we exist to solve business problems. Problem solving and strategic planning isn't a "thing" you do at Partners In Brainstorms; it's what you do at PIB. It's almost as though you approached everything looking for ways it could be better, whatever it is. A part of you is always asking, "Why is something done this way? Is this the best way it can be done?

Strategic planning involves developing a roadmap for an organization, municipality or local government and all its components. It addresses the mission of the organization in terms of its main business. The methodology recommended by Partners In Brainstorms for strategic business planning involves the following cycle:

Planning

Evaluating and Feedback   Controlling

This process aids in the development of long-term business strategies and plans, which are based on solid research, analysis and evaluation.

The Strategic Planning methodology that Partners In Brainstorms would recommend is as follows:

I.   Planning

    a. Set goals (involve employees and management team in the process)

    b. Operation planning

        i.   Define objectives

        ii. Design the organization in the best way to achieve the goals and objectives

        iii. Assign responsibilities

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     iv. Allocate resources

     v. Design organizational controls (timetables and measures of the organization's performance as a whole)

II.   Controlling

    a. Management control (ensure efficient and effective use of resources)

       i. Develop standards including operational performance measurements and benchmarks

      ii. Design project controls (such as work plans and milestone charts)

     iii. Motivate staff

     iv. Monitor progress

     v. Review, access and document both successes and any issues (policy analysis, studies, projects or reviews)

III.   Evaluate and Feedback

Strategize for the Future, Not the Present
Partners In Brainstorms has implemented this strategic planning methodology for almost every one of our clients, including AOL (America Online), Arizona Game and Fish Department, Arizona Department of Health Services, United States Postal Services, and others. In strategizing for the future, an organization must envision the future but also look to economic, political, social and market drivers which is also addressed in Section 3.4.2 Economic Research, Analysis and Trends.

Applicable Case Studies

1. AOL Premium Services – New Product Introductions
2. AOL@SCHOOL
3. Girl Scouts of the USA – Both *Volunteer* and *New Directions for Girls 11-17 Programs*

3.4   RESEARCH TYPES

3.4.1 Statistical (Quantitative)

Partners In Brainstorms uses the benefits of statistical quantitative research in providing solid data to support the results found in qualitative research. The most popular quantitative technique that is used today is the statistical survey. Quantitative surveys, especially Internet-based surveys are comprehended and controlled by respondents at their own pace versus that of the interviewer.

Establish objectives. The first step Partners In Brainstorms takes with their clients is to define what the management wants to achieve from the quantitative research. Identify clear marketing research objectives from the management team and what data they want to collect at the end of the study and how the data will be represented.

Determine the research design. The second step in Partners In Brainstorms statistical research process is to recognize the target market segments and areas that need exploring. Once that is establish, then the size of the quantitative study is determine and email list are generated. Partners In Brainstorms has a database over 300,000 names and resources to additional list.

Develop a screening profile for telephone, mail or Internet-based survey respondents. Just like in qualitative research, Partners In Brainstorms strongly believes a screener is essential to having a successful research study. When selecting the respondents a screener is used to identify the best person qualified for the quantitative study based on a series of questions designed for that particular survey. If qualified the respondent will continue the survey which consist of approx 20questions and two-three open ended questions estimating 8-10 minutes to complete. After completion of the survey the respondent qualifies for an incentive.

Collecting the data. At the conclusion of the quantitative study the information is extracted into data tables and analysis.

Establish a budget. Partners In Brainstorms has conducted several quantitative surveys over the years. When developing the quantitative survey the budget is used as a guideline to determine the length of the survey, the number of participants and the length of time the survey is available online. Partners In Brainstorms also has the capability to monitor completed surveys by real-time project management.

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Applicable Case Studies

1. Arizona Department of Game and Fish *Statewide Perceptions Study*
2. America Online *AOL@SCHOOL*
3. Girl Scouts of the *USA New Directions for Girls 11-17 Study*

3.4.2 Economic Research, Analysis and Trends

Partners In Brainstorms over the last few years has been very involved in conducting economic research, collecting and analyzing data, monitoring economic trends, and developing forecasts. In the process, PIB has devised methods and procedures for obtaining the data that meet our client's needs. For example, we use various sampling techniques to conduct a survey, and multiple mathematical modeling techniques to develop forecasts.

Preparing reports, including tables and charts, with actionable recommendations is a priority for PIB. The PIB philosophy includes presenting economic and statistical concepts in a clear and meaningful way that are particularly important to help direct making policies for an organization.

Economic Drivers	Public Drivers	Organizational Drivers

Partners In Brainstorms believes that one must truly have an understanding of the economic drivers that directly impact behavior of the customer, individual and the public. Within the last month, Partners In Brainstorms has seen a tremendous impact of the hurricane Katrina and economic impact on the public, specifically the cost of gasoline. In a pricing study, consumers and the public now make reference to the cost of a product or service in terms of equating the price to its equivalent in terms of how many gallons of gas. Gas is the new pricing formula. This economic impact is directly driving consumer behavior that will impact discretionary spending, tax revenues and expectations of the federal and state agencies.

Partners In Brainstorms has found that excellent organizations, municipalities and local governments take an outside-inside view of their business. They recognize that the economic environment is constantly changing and offering new opportunities and threats. These organizations, municipalities and local governments recognize the vital

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importance of continuously monitoring and adapting to the changing economic environment.

Analyzing Needs and Trends…"In Today Already Walks Tomorrow." Partners In Brainstorms believes one must draw a distinction between a fad, a trend and a megatrend. A fad is unpredictable, short-lived and without social, economic and political significance. Trends are a direction or sequence of events which have some momentum and durability. A trend is observable, has longevity, is observable across several market areas and public activities, and is consistent with other significant indicators occurring or emerging at the same time. Megatrends are large social, economic, political and technological changes that are slow to form, and once in place, influence us for some time—between seven and ten years, or longer.

Partners In Brainstorms has found that in working with our Fortune 500 companies, federal and state agencies and associations, we continually monitor six major forces:

1. Demographic

   - Population growth

   - Population age mix determines needs

   - Ethnic markets

   - Education level – attainment

   - Household patterns (i.e. growth of nontraditional households)

   - Geographical shifts in population

2. Economic

   - Income distribution

   - Savings, debt, credit availability

3. Natural

   - Shortage of raw materials (oil)

   - Increased cost of energy

   - Changing role of governments in environmental protection

4. Technological

   - Accelerating pace of technological change

   - Unlimited innovational opportunities

   - Varying research and development budgets

5. Political

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- ▪ Regulation
- ▪ Public-interest groups

6. Cultural

- ▪ Core cultural values have high persistence
- ▪ Each culture consists of subcultures
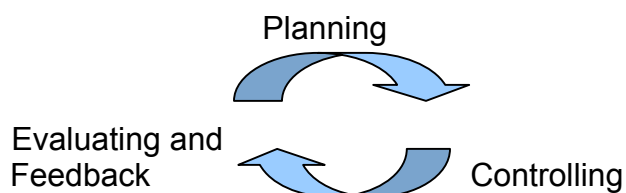- ▪ Secondary cultural values undergo shifts through time

Applicable Case Studies

1. AOL Premium Services – New Product Introductions
2. AOL@SCHOOL
3. Girl Scouts of the USA – Both *Volunteer* and *New Directions for Girls 11-17 Programs*

3.4.2   Strategic Business Planning

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Planning

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Controlling

This process aids in the development of long-term business strategies and plans, which are based on solid research, analysis and evaluation.

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               i. Define objectives

              ii. Design the organization in the best way to achieve the goals and objectives

             iii. Assign responsibilities

             iv. Allocate resources

              v. Design organizational controls (timetables and measures of the organization's performance as a whole)

II.   Controlling

        c. Management control (ensure efficient and effective use of resources)

               i. Develop standards including operational performance measurements and benchmarks

              ii. Design project controls (such as work plans and milestone charts)

             iii. Motivate staff

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III.   Evaluate and Feedback

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Applicable Case Studies

1. AOL@SCHOOL
2. Girl Scouts of the USA – Both Volunteer and New Directions for Girls 11-17 Programs
3. United States Postal Service – Stampers and Celebrate the Century

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3.4.3   Financial Planning and Forecasting

Financial planning research within a state agency accomplishes several important functions – they state future projections of revenues, expenses, and expected profits and can be used as a tool to conceptualize future goals in specific financial terms and to immediately consider how to achieve these goals.

The process Partners In Brainstorms uses for financial planning research is to:

1. Identify the financial goals of the state agency
2. Evaluate each individual department budget to ensure that is accomplishes or contributes to the accomplishment of the organization's goals.
3. Integrate the various budgets submitted by subunits into a total organization budget.

Forecasting Methodology. The key to organizational survival and growth is the firm's ability to adapt to strategies to a rapidly changing environment. This places a large burden on management to anticipate future events correctly. The following are some examples of Partners In Brainstorms methodologies:

- *Trend Correlation*
  Identify leading and lagging economic indicators that can be used for forecasting. Partners In Brainstorms uses the National Bureau of Economic Research twelve of the best leading economic indicators and their values are published monthly in the *Survey of Current Business*.

- *Econometric Modeling*
  Build a set of equation that describes the underlying system. The coefficients in the equations are fitted statistically. Econometric models containing more than 300 equations, for example, are used to forecast changes in the U.S. economy.

- *Cross-Impact Analysis*
  Identify a set of key trends (those of high in importance and/or probability). The question is then put: "If event A occurs, what will be its impact on other trends?" The results are then used to build sets of "domino chains," with one event triggering others.
.
- *Multiple Scenarios*
  o Build pictures of alternative futures, each internally consistent and having a certain probability of occurring. The major purpose of the scenarios is to stimulate management to think about and plan for contingencies.

- ▪ *Demand/Hazard Forecasting*
  Identify major events that would greatly affect the public, state, agency, or department. Each event is rated for its convergence with several major trends taking place in society. It is also rated for its appeal to each major public in the society. The higher the event's convergence and appeal, the higher its probability of occurring. The highest-scoring events are then research further.

Applicable Case Studies

1. AOL@SCHOOL

2. Girl Scouts of the USA – *New Directions for Girls 11-17*

3. U.S. Postal Service – Celebrate the Century Initiative

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3.4.4   Survey Types:

3.4.4.1 Opinions and Attitudes

The measurement of attitudes is central to many marketing situations. The strategy of market segmentation is often based on attitudinal data. Determining the attitudes of different market segments toward a product can be essential to developing a "positioning" strategy. Attitude measurement is often the basis for evaluating the effectiveness of an advertising campaign. In addition, the assumed relationship between attitudes and behavior helps in the prediction of a program acceptance and in the development of a communication program.

Surveys are designed to probe three main components:
- Cognitive component—a persons' beliefs about a program, product or service
- Affective component—a person's feelings about the program, product or service, such as is it good or bad
- Behavioral component—a persons' readiness to respond behaviorally to the program, product or service

Applicable Case Studies

1. Arizona Department of Game and Fish *Statewide Perceptions Study*
2. Arizona Department of Health Services Tobacco Education & Prevention Program (TEPP) – *Youth Outreach Campaign GearHeadz Study*
3. Girl Scouts of the *USA New Directions for Girls 11-17 Study*

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   - Geographical shifts in population

2. Economic

   - Income distribution

   - Savings, debt, credit availability

3. Natural

   - Shortage of raw materials (oil)

   - Increased cost of energy

   - Changing role of governments in environmental protection

4. Technological

   - Accelerating pace of technological change

   - Unlimited innovational opportunities

   - Varying research and development budgets

5. Political

   - Regulation

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- Public-interest groups

6. Cultural

- Core cultural values have high persistence

- Each culture consists of subcultures

- Secondary cultural values undergo shifts through time

Applicable Case Studies

1. U.S. Postal Services *National Youth Stamp Collecting Program*
2. Arizona Game and Fish Department
3. AOL@SCHOOL

3.4.4.3 Strategic Business Planning

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Evaluating and
Feedback

Controlling
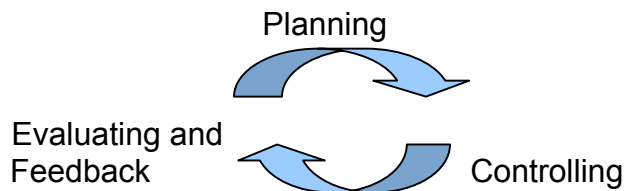
This process aids in the development of long-term business strategies and plans, which are based on solid research, analysis and evaluation.

Suggested survey types for strategic business planning involves one-on-one interviews with management and key employees to best access goals which is qualitative research. Based on the findings of the of the qualitative a survey is developed that Partners In Brainstorms would recommend is administered to all employees so they feel they have a say in the process and future direction of the company. The majority of times these surveys are administered online and are a majority of closed-ended questions.

The Strategic Planning methodology that Partners In Brainstorms would recommend is as follows:

I. Planning

    a. Set goals (involve employees and management team in the process)

    b. Operation planning

- Define objectives
- Design the organization in the best way to achieve the goals and objectives
- Assign responsibilities
- Allocate resources
- Design organizational controls (timetables and measures of the organization's performance as a whole)

II. Controlling

    a. Management control (ensure efficient and effective use of resources)

- Develop standards including operational performance measurements and benchmarks
- Design project controls (such as work plans and milestone charts)
- Motivate staff
- Monitor progress
- Review, access and document both successes and any issues (policy analysis, studies, projects or reviews)

III. Evaluate and Feedback

Applicable Case Studies

1. Arizona Game and Fish Department
2. AOL@SCHOOL
3. Girl Scouts of the USA – Both Volunteer and New Directions for Girls 11-17 Programs

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3.4.5   Survey Purposes
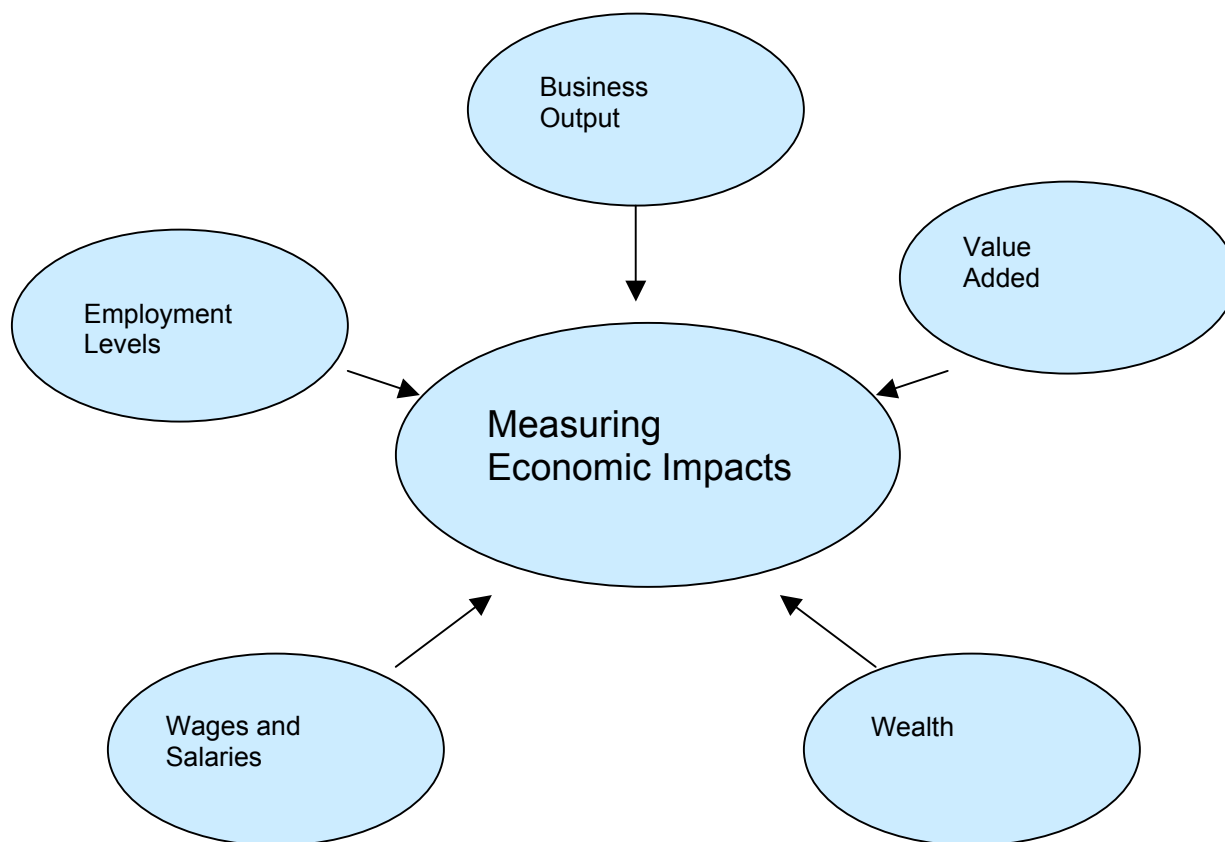
3.4.5.1 Economic/Fiscal Impact Survey

Partners In Brainstorms implemented economic impact survey traces spending through an economy and measures the cumulative effects of that spending. The impact region is determined by the nature of the proposal and can be the entire country, state, an individual municipality or a combination of municipalities. Partners In Brainstorms believes that defining the area of influence is an important first step in the survey process.

In addition to surveying the economic consequences of a particular project on the local economy, Partners In Brainstorms would also suggest a broader evaluation survey or decision-making process. For example, there may be social benefits and ecological consequences that need to be taken into account, which would require a different methodology than a general impact survey. Partners In Brainstorms has found that in some cases a more general cost benefit analysis will attempt to place a monetary value on environmental and social impacts.

Partners In Brainstorms feels it is necessary to survey and estimate the proportion of employment and spending that will occur in the municipality in order to accurately represent what the impact will be. Partners In Brainstorms would propose when measuring economic impacts and various studies or approaches we may propose that the survey addresses one or more of the following measures:

1. Employment levels (jobs)
2. Value added (or gross regional product)
3. Aggregate wages and salaries
4. Wealth (including property values)
5. Business output (sales volume or spending).

Each of these measures reflects a particular dimension of improvement in the economic well being of area residents, which is usually the major goal of economic development efforts. Partners In Brainstorms has found that the majority of economic/fiscal impact surveys focus on the changes in employment levels and spending as the most easily determined and understood measures of economic impact. However, economic impacts can also be measured by the rise in personal income and property values

Total Employment Levels reflect the number of additional jobs created by economic growth. This is the most popular measure of economic impact because it is easy to comprehend. However, job counts don't necessarily reflect the quality of employment opportunities, nor do they reflect salary levels.

Value Added (which is normally equivalent to Gross Domestic Product or Gross Regional Product) is a broader measure of the full income effect. This measure essentially reflects the sum of wage income and corporate profit generated in the study area. However, Partners In Brainstorms has found that in today's increasingly global economy, value added can be an over-estimate of the true income impact on a local area insofar as it includes all business generated there. It may include, for example, dividends to owners of the business who do not reside in the study area, and that which is reinvested in corporate facilities outside of the study area. Thus, while value added is

the most appropriate measure of impact on overall economic activity in a geographic area, so are the wages and salaries.

Aggregate Wages and Salaries in an area rise as pay levels rise and/or additional employees are hired. Either or both of these conditions can occur as a result of growth in business revenues. As long as nearly all of those affected employees live in the study area, this is a reasonable measure of the personal income benefit of a project or program. However, it is still an under-estimate of the true income impact, insofar as there is also some net business income (profit) generated that may be paid out. For example, business income may be paid as dividends to local residents or reinvested locally in buildings, equipment or labor training, thereby further improving the economic base of the area.

Wealth is also a reflection of generated income. In economic terms, it is the present value of a discounted stream of future income. A good measure or barometer of wealth in a community is property value. However, it would be double counting to add property value changes to income or value added changes when calculating economic impact. This is because when property values rise in a community as a result of increased economic activity, the rise may be a direct consequence of increased aggregate personal income or investment of business profits, which is a current phenomenon in the state of Arizona and key municipalities.

Business Output (also referred to as revenue or sales volume) is the broadest measure of economic activity. It, in turn, includes the full (gross) level of business revenues, which pays for costs of materials and costs of labor, as well as generating net business income (profits). This can be a misleading measure of economic development benefit, since it does not distinguish between a high value added activity (generating substantial local profit and income) and a low value added activity (generating relatively little local profit or income from the same level of sales). Business output is a problematic measure of economic development because it is difficult to avoid double and triple counting.

Partners In Brainstorms would also look at economic impacts that lead to financial impacts, which are changes in government revenues and expenditures. Economic impacts on total business sales, wealth or personal income can affect municipal revenues by expanding or contracting the tax base. Impacts on employment and associated population levels can affect municipal expenditures by changing demand for public services. Yet while they are related, financial impacts are not the same as the broader economic impacts on a community.

Partners In Brainstorms seven steps below describe in general terms the inputs, analysis and products of an economic impact analysis.

Step 1: Define the scope of the study and alternatives to be considered in the analysis.

Step 2: Define exactly what decisions need to be made, what information is being requested, and what questions the study should answer.

Step 3: Determine how detailed the assessment should be.

Step 4: List in the study all fundamental assumptions and limitations.

Step 5: List all economic impacts that are considered.

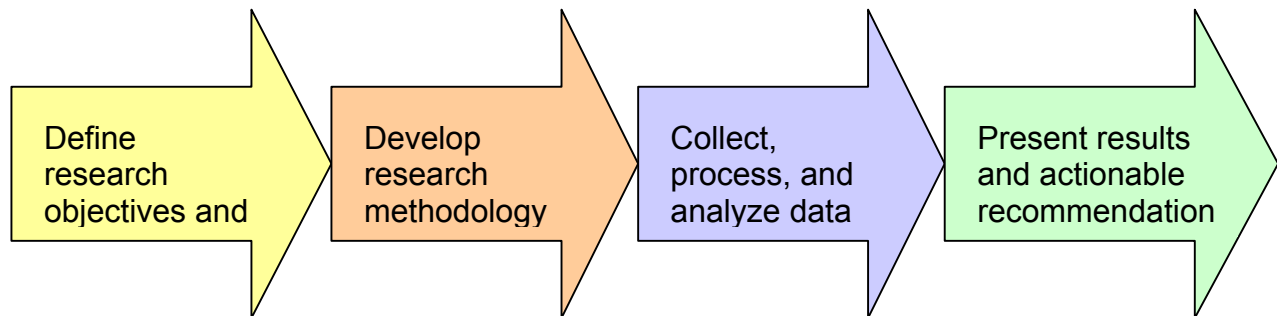**Step 6:** Determine what data are needed, what are available, and how they will shape the study.

Step 7: Analyze the effect of each alternative on the individual economic areas being considered and analyze indirect effects (or cross-impacts) among economic areas.

Applicable Case Studies

1. U.S. Postal Services National Youth Stamp Collecting Program
2. AOL@SCHOOL
3. Arizona Game and Fish Department *Statewide Perceptions Study*

3.4.5.2 Market

The process Partners In Brainstorms uses for market research:

| Define research objectives and | Develop research methodology | Collect, process, and analyze data | Present results and actionable recommendation |

Define Research Objectives and Specify Needs. The first step Partners In Brainstorms takes with their clients is to define the problem or need specifically and agree on the research objectives. Management must steer between defining the problem too broadly or to narrowly. Objectives must be obtainable and address specific needs.

Develop Research Methodology. The second step in Partners In Brainstorms market research process is to develop the most efficient plan for gathering the needed information either through secondary sources or primary data. Primary data can be collected in four ways: 1) observation, 2) focus groups (qualitative), 3) surveys (quantitative), and 4) experiments. The determination of the methodology to be selected is largely dependent on the research objectives, needs and budget parameters. During this phase, Partners In Brainstorms also designs a sampling plan that addresses: Who is to be surveyed? How many? and How should the respondents be chosen?

Collect, Process, and Analyze Data. Partners In Brainstorms believes in utilizing ever-changing technology to aid in the collection, processing and analyzing of the data. Partners In Brainstorms is experienced in all forms of collecting data (focus groups, one-on-one interviews telephone interviews, mail surveys, online surveys). Over the last three years, we have seen a tremendous acceptance and public preference for online surveys.

Validity of Web-Based Surveys
According to a major study conducted by Krosnick and Chang (2001), Web survey participants' responses "contained fewer random and systematic errors than their telephone counterparts." The study offered three explanations for these differences:

One is the recency effect, which can occur when questions are presented aurally and respondents, lacking sufficient time to process all the responses, select the last response offered.

Web surveys are comprehended and controlled by respondents at their own pace versus that of the interviewer.

Telephone interviews showed a high degree of compliance, indicating that respondents may tend to agree with what they perceive is the interviewer's opinion rather than voice their own beliefs and attitudes.

Large Proportion of Hispanic Internet Users in Arizona
Also, Internet usage is increasing in Arizona. According to Northern Arizona University, which conducted a study for the Grand Canyon State Poll in 2001, 68 percent of all Arizonans were using the Internet on a daily basis, a 10% increase over usage in 2000. In addition, according to the Pew Internet & American Life study, the three-state region referred to as the Border States (Arizona, New Mexico, and Texas) are tied with California for the largest proportion of Hispanic Internet users in the country (21 percent of all Internet users). As previously noted, according to the 2000 Census, the Hispanic population of Arizona represents 25.3 percent of the entire state population.

Present Results and Actionable Recommendations. Partners In Brainstorms develops research reports that are engaging, enlightening, and actionable. Many of the research reports created for Girl Scouts of the USA are in fact being sold at a profit to the public and contained in the Library of Congress (see Ten Emerging Truths for Girls 11-17 and Voices of Volunteers). The reports incorporate images, graphs and actionable recommendations that can be implemented in the real world.

Applicable Case Studies

1. Arizona Department of Game and Fish *Statewide Perceptions Study*
2. Arizona Department of Health Services Tobacco Education & Prevention Program (TEPP) – *Youth Outreach Campaign GearHeadz Study*
3. Girl Scouts of the *USA New Directions for Girls 11-17 Study*

3.4.5.3 Program Evaluation

Defining Objectives
Applying our research-into-action process described above, PIB's first step in conducting process evaluation research is to define its objectives. We do this by meeting with the client and asking several key questions about the program, the answers to which are essential to planning the research. This discussion helps clarify the purpose of the research for the client as well as PIB, and clients sometimes decide to modify or expand the original focus of the evaluation as a result of their broadened perspective on the program. These key questions include:

- In what stage of development is the program – i.e., single-service, multi-service, coordinated-service, or collaborative program? This information helps determine the scope and focus of the research. For example, a relatively new program is not ready to assess results/outcome but could benefit from such information as user demographics, satisfaction levels among users, or public awareness of its services. On the other hand, a long-term collaborative program might wish to assess its effects on the community or the success of interagency coordination and cooperation.

- What is the program trying to do? A logic model may be used here to articulate the program mission, clarify the program design, explain the service delivery method, and specify intended results and how they can be measured.

- What information does the funding agency expect? Are there additional reporting requirements to be met?

- Who is the program's target population? What methods are used to reach that population? Are participants actively recruited? Is participant recruitment a program goal?

- What does the program already know? Have evaluations been previously conducted? Is there data available on community needs related to this program? If the program uses a computer system, is a management information system (MIS) in place?

- What does the program want to know? Possible areas include responsiveness to participant needs, community perception of program and services, primary users of services, most frequently used services, effectiveness in attaining goals, cost effectiveness, expected demands for additional services, resources needed to provide those services (e.g., staffing, training), etc.

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Because it is essential that this conversation be as candid as possible, PIB typically suggests that the researcher meet with the various key stakeholders individually, asking the same questions of each. This method encourages candor on the part of the stakeholders and has the added benefit of identifying areas in which stakeholders express similar or dissimilar views.

Developing Research Methodology
Based on the information obtained during the planning phase, followed by a thorough literature review of similar evaluation research, an evaluation approach and methodology are developed, keeping first and foremost in mind the specific needs of the client. The nature and scope of the evaluation further helps determine such factors in the research plan as the use of qualitative, quantitative, or a mix of both research methods; use of participant sampling; and relevant variables to be measured, such as gender, ethnicity, rural or urban location, number or type of services used, frequency of participation, etc., as well as data collection methods.

As previously discussed, stakeholders are the populations most directly affected by evaluation findings and recommendations, and involving them early on – before data collection even begins – contributes significantly to meaningful evaluation research. For example, informing program staff of the nature and purpose of a program evaluation helps stem rumors among staff and improves overall cooperation.

Using Specialized Resources
As noted previously, PIB creates teams on a per-project basis to ensure that they are made up of the best people for the specific area and/or type of research. When necessitated by the nature of the project, PIB has available the services of several researchers with expertise in specific subject areas. For example, when we conducted qualitative research nationwide for "A Girl's World Is Different" – a review of juvenile justice programs around the country regarding their services aimed at girls – we included on the team a licensed clinical/research psychologist highly skilled at conversing with a wide range of individuals and widely respected for her sensitivity when dealing with children and teenagers.

Collecting, Processing, and Analyzing Data
Again, the nature and scope of the evaluation, including the methodology factors discussed above, helps us determine the most appropriate data collection methods. For the most part, we use a combination of methods that include reviewing program records, reports, proposals, previous evaluations, and similar documents; interviews and/or focus groups of stakeholders; on-site observation of participants; and surveys of service providers (including volunteers, if applicable), service users, and if feasible, individuals who are eligible to obtain program services but remain non-users.

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As research participants, stakeholders are typically the richest source of information about a program. Providers as well as users know what's working and what isn't – and if their views on the subject differ significantly, that information itself might prove to be among the most valuable obtained. Therefore, depending on the size of the stakeholder population, PIB typically conducts one-on-one interviews with a few designated key stakeholders as well as one or more focus groups of stakeholders. Depending on the scope of the evaluation, qualitative data obtained from stakeholders can be used to identify areas for further quantitative research.

When the overall research plan – objectives, approach, and methodology – is completed, we prepare two additional documents: a budget that specifies the client costs and the services to be provided to the client under the proposed plan. If the plan calls for subcontracted services, those costs are incorporated into the budget presented to the client; we are big fans of the "no surprises" principle. A corollary timeline is also prepared that includes each task and deliverable (such as interim reports prepared by PIB), specifies its completion date, and notes whether it is the responsibility of the client or of PIB. This graphical presentation of the entire evaluation process, step by step, is helpful as a checklist and progress monitoring tool, as a reference when scheduling other time commitments, and as a confirmation of task responsibility and due date. We take our deadline commitments very seriously, and in the rare event that we anticipate a delay on our part, we notify the client immediately and look for ways to get back on schedule.

Presenting Results and Actionable Recommendations
The final milestone in the research-into-action process is PIB's preparation of a final report and actionable recommendations based on the research findings. Depending on the evaluation project, PIB's recommendations may address an indicated need for staff training, clarification of protocols and procedures, coordination of service delivery among providers, etc. Whatever the subject of the evaluation, PIB presents clearly stated recommendations for specific action. The recommendations may range from suggested action that can and/or should be taken as quickly as possible to long-term strategic planning, but they will always be specific and geared to the designated audience. Several of PIB's final reports on extensive research projects have been published by the client for sale to the public and continue to be sold as reference tools and guidelines for action.

Applicable Case Studies

1. Arizona Department of Game and Fish *Statewide Perceptions Study*
2. Girl Scouts of the USA *New Directions for Girls 11-17 Study* (Creation of New Program)
3. Girls Scouts of the USA *Voices of the Volunteer Study* (Operations Research – Attracting and Retaining Volunteers Key to Organization Success)

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3.4.5.4 Program Planning

Partners In Brainstorms has done an extensive amount of program planning, primarily in education, associations and non-profits. The Program Planning is developed based on sound research in evaluating key components of the program.

Partners In Brainstorms has found that once an organization, municipality, or local government has developed its principal strategies, it must work out supporting programs.

Surveys related to program planning address the 7S's:

▶ Structure
▶ Systems
▶ Style
▶ Staff
▶ Skills
▶ Strategy
▶ Shared Values

Applicable Case Studies

1. Arizona Department of Game and Fish *Statewide Perceptions Study*
2. Girl Scouts of the USA *New Directions for Girls 11-17 Study* (Creation of New Program)
3. Girls Scouts of the USA *Voices of the Volunteer Study* (Operations Research – Attracting and Retaining Volunteers Key to Organization Success)

3.4.5.5 Policy Development

The notion of "policy" encompasses a broad range of organization types and the corresponding constituencies impacted by the policy. Governmental entities establish public policy – often in the form of legislation – that governs all citizens under their jurisdiction. Business organizations establish internal policies concerning employee behavior, including treatment of employees by other, higher-level employees. And professional membership organizations often establish both internal and external policies, with internal policies aimed at administrative issues and external policies reflecting a public stance being taken because of the organization's natural involvement in the issue – the National Education Association issuing a policy statement about overcrowded schools and the appropriate teacher-student ratio, for example.

For any organization, consideration of a policy change often arises as a perceived solution to a problem – frequently, a distantly related problem – and that might well be the case for a state agency undertaking policy development research under this Solicitation. Statewide budgetary cutbacks, for example, can lead to policy changes that curtail the delivery of services – not because the services are problematic, but paying for them is.

For reasons like this, P—I—B-- approaches policy development research as a heavily front-loaded process. That is, our typical first step of identifying needs and defining research objectives must expand considerably – and frequently that expansion occurs prior to needs identification by means of preliminary qualitative research conducted "under the radar" to get an early sense of constituent reaction. The nature of the organization or entity, the specific policy area under consideration, the breadth of the affected constituency – each of these factors can independently impact the nature and duration of this preliminary phase.

In the case of particularly sensitive policy issues, we often take on the role of facilitator first and researcher second, to help clarify the issues behind the policy change.

Applicable Case Studies

1. Arizona Department of Game and Fish *Statewide Perceptions Study (Employees and Management)*
2. Girl Scouts of the USA *New Directions for Girls 11-17 Study* (Creation of New Program)
3. Girls Scouts of the USA *Voices of the Volunteer Study* (Operations Research – Attracting and Retaining Volunteers Key to Organization Success)

3.4.5.6 Customer and/or Employee Satisfaction

As discussed earlier, Partners In Brainstorms (PIB) emphasizes the client-centered approach in every project we undertake, from program evaluation to policy development. When research turns into action, and PIB is involved in making that happen, we follow the same philosophy by assembling a panel representing our client's customers. And we continue to work with that panel throughout the design process, obtaining feedback and relaying it on to our client.

We approach the design of customer and/or employee satisfaction research the same way – we look at everything in our client's organization through the eyes of its customers and/or employees. What do we see? What don't we see? What do we want to know more about? And we ask our client to do the same thing . . . ask the same questions, which frequently leads to entirely new questions and areas to investigate.

All this sounds very easy, and in terms of implementing research, it probably is. However, our experience over the years has shown us that meaningful customer or employee research must come from the top down; if senior management isn't actively supporting the study, there's probably not much point in raising anyone's hopes for no reason.

We are currently wrapping up a percepton and attitude study for Arizona Game and Fish Department, where senior management has been highly supportive. The study began with the collection of qualitative data through personal individual interviews with most of the management team. At that step and every other, we have been working closely with our client to identify key questions.

Applicable Case Studies
1. Girl Scouts of the USA New Directions for Girls 11–17 Study (Nationwide Research Among Girls to Identify Their Preferences for Program)
2. Arizona Department of Game and Fish *Statewide Perceptions Study (*General Public's Attitudes/Opinions Regarding Services)
3. AOL@SCHOOL

3.4.5.7 Needs Assessment

At Partners In Brainstorms, we feel strongly about the purpose and value of needs assessment and analysis projects – that they should be undertaken to ensure that modifications under consideration for a program or service be grounded in the needs and priorities of the anticipated end users or "customers," and that a real commitment exist to address those expressed needs to the extent realistically possible,

Defining Objectives
Applying our research-into-action process described earlier, PIB's first step in conducting a needs assessment is to define its objectives. While needs assessment research can be succinctly defined as a systematic examination of *what is* in comparison with *what should be*, its scope can be as broad as the health care needs of the state's incarcerated population or as narrow as training needs on technical procedures among the staff and volunteers of a grant-receiving organization. Additionally, needs assessments can be undertaken for different purposes. A service provider might use the comparison between *what is* and *what should be* to identify and resolve shortcomings in existing delivery systems. A Division manager might undertake needs assessment research as part of the strategic planning process, to identify developing trends and the corollary services that are likely to be required from the Division in the short term and long term. And in a social marketing context, needs assessment goes beyond the identification of problems to include an examination of values, beliefs, and concerns of consumer populations – the *why's* behind their behavior. Knowledge of these factors provides valuable insight into the information channels and types of messages that will be most effective in reaching these populations – with the ultimate goal of effecting positive change in consumer behavior (e.g., to stop smoking, obtain prenatal care, etc.).

Members of the research team meet with the client to determine the specific purpose and scope of the needs assessment. Areas to be explored include:

- Problems or deficits – Indications from existing data, program or service usage and non-usage, comparisons with other communities, consumer complaints, staff comments or turnover, difficulties with procedures, forms, documentation, reporting mechanisms, etc.

- Impending change – Anticipated problems due to new procedures, technology, staffing, etc.

- Opportunities – Proactive approach to developing trends, taking advantage of new technologies

- Strengths – Individual staff and/or volunteers, organization climate of department or division, facility and physical resources, staff development program, documentation of procedures, etc.

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- Target populations – Consumers, staff, or both; ethnicity, age, or gender related; community or statewide, etc.

Developing Methodology

Based on the information obtained during the definition of objectives, and following a thorough review of the literature, a research plan for the needs assessment, including research methodology to be utilized, is developed. Depending on the scope and purpose of the specific needs assessment project, the PIB research team considers various qualitative and quantitative methodologies and presents its recommendations to the client. Qualitative methodologies include:

In-depth interviews with key stakeholders – Depending on the scope and nature of the needs assessment, these interviews may be conducted locally or in various locations throughout the state, and the individuals interviewed may be managers, other staff, volunteers, regular program/service users, community leaders, educators, families, etc.

Focus groups – Depending on the scope and nature of the needs assessment, these focus groups may be conducted locally or in various locations throughout the state, and groups may be structured to represent specific population segments.
Quantitative research requires data collection from a large enough proportion of the target population to permit extension of the findings to the overall target population. This is sometimes difficult to achieve if the focus of the needs assessment is narrow and the target population is small. When quantitative research is appropriate for the project, PIB recommends the use of online surveys over telephone banks for the following reasons:

According to a major study conducted by Krosnick and Chang (2001), Web survey participants' responses "contained fewer random and systematic errors than their telephone counterparts." The study offered three explanations for these differences:

- One is the recency effect, which can occur when questions are presented aurally and respondents, lacking sufficient time to process all the responses, select the last response offered.
- Web surveys are comprehended and controlled by respondents at their own pace versus that of the interviewer.
- Telephone interviews showed a high degree of compliance, indicating that respondents may tend to agree with what they perceive is the interviewer's opinion rather than voice their own beliefs and attitudes.

Also, Internet usage is increasing in Arizona. According to Northern Arizona University, which conducted a study for the Grand Canyon State Poll in 2001, 68 percent of all Arizonans were using the Internet on a daily basis, a 10 percent increase over usage in 2000. In addition, according to the Pew Internet & American Life study, the three-state region referred to as the Border States (Arizona, New Mexico, and Texas) is tied with

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California for having the largest proportion of Hispanic Internet users in the country (21 percent of all Internet users). This figure takes on even greater significance when combined with one from the 2000 U.S. Census – the Hispanic population of Arizona represents 25.3 percent of the state population.

Collecting, Processing, and Analyzing Data
The research plan developed for the specific needs assessment helps determine the data collection methods to be used. Generally, needs assessments begin with a collection of qualitative data from key stakeholders. This information then helps us construct a framework for the subsequent quantitative research, including the primary issue of whether the needs assessment warrants sampling and whether the target population is large enough to permit it – e.g., a needs assessment for employees of a specific Division of state government versus a needs assessment for a segment of the statewide population.

When the overall research plan – objectives, approach, and methodology – is completed, we prepare two additional documents: a budget that specifies the client costs and the services to be provided to the client under the proposed plan. If the plan calls for subcontracted services, those costs are incorporated into the budget presented to the client; we are big fans of the "no surprises" principle. A corollary timeline is also prepared that includes each task and deliverable (such as interim reports prepared by PIB), specifies its completion date, and notes whether it is the responsibility of the client or of PIB. This graphical presentation of the entire evaluation process, step by step, is helpful as a checklist and progress monitoring tool, as a reference when scheduling other time commitments, and as a confirmation of task responsibility and due date. We take our deadline commitments very seriously, and in the rare event that we anticipate a delay on our part, we notify the client immediately and look for ways to get back on schedule.

Presenting Results and Actionable Recommendations
The final milestone in the research-into-action process is PIB's preparation of a final report and actionable recommendations based on the research findings. Depending on the focus of the needs assessment, PIB's recommendations might include suggested strategies for resolving a problem, preparing employees and customers for impending change, involving employees in identifying trends and developing proactive strategies, expanding upon strengths, etc. PIB recommendations are always specific, actionable, and responsive to financial or other constraints experienced by the client.

Applicable Case Studies
1. Girl Scouts of the USA New Directions for Girls 11–17 Study (Nationwide Research Among Girls to Identify Their Preferences for Program)
2. Arizona Department of Game and Fish *Statewide Perceptions Study (*General Public's Attitudes/Opinions Regarding Services)
3. AOL@SCHOOL

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